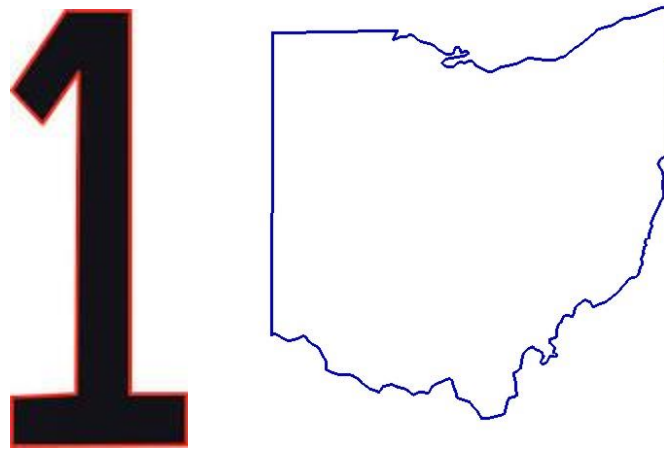


Oh1o* Fiscal Resource

*Simplifying Access to Web-Based Fiscal
Information for State of Ohio Employees*



Ohio Fiscal Academy

Cohort 5
2015

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* 'One Ohio'

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Executive Summary

In an effort to promote further accuracy, continuity, and efficiency across all layers of State of Ohio fiscal management, Team Oh1o has identified a need for the creation of a fiscal homepage, or portal, to be made available to all State of Ohio employees – a unified, ‘One Ohio’ approach to all things budget and finance. This web-based platform will be an easy-to-understand, highly-organized, regularly monitored-and-updated environment that will make already-existing State of Ohio resources and independent websites available from a single location.

The goal of creating a broad-encompassing launch point of State of Ohio fiscal information is to better equip all State of Ohio employees regardless of location or position with a one-stop connection to the many valuable resources already available that may otherwise be unknown or difficult to navigate. By way of improved access to information, this webpage will empower both fiscal and non-fiscal State of Ohio employees with expanded knowledge enabling them to perform more accurately and efficiently. As the name suggests, the intent is to address the absence of a statewide approach to fiscal management as it relates to continuity of information access, in addition to the absence of statewide preparedness of on-boarding and succession planning.

Functionally-speaking, this webpage will cater to the wide-range of traditional fiscal State of Ohio employees. Though further, it will also serve as a straightforward, easy-to-navigate resource for management and leadership, and non-fiscal employees, in addition to anyone with internet access and an interest in publically-available State of Ohio fiscal information.

Following the initial proposal made by Team Oh1o in March 2015, the team was introduced to the Ohio Office of Budget and Management’s (OBM) then-in development The FIN SOURCE, which later launched in September 2015. Although not identical concepts, the overarching goal between Oh1o Fiscal Resource and The FIN SOURCE were – and remain – very similar. Following through on its original proposal, Team Oh1o chose to see to capstone case study completion its own vision independent of The FIN SOURCE. Although practically-speaking, the Oh1o Fiscal Resource concept can potentially influence the evolution of The FIN SOURCE.

With more than a century of combined State of Ohio service, Team Oh1o used its functional experience to lay the framework of the Oh1o Fiscal Resource webpage. Coupled with surveying colleagues and leadership, via both direct interview and anonymous survey, in addition to researching best practices for developing and launching a web presence, Team Oh1o has pulled together a recommendation that offers instant value with minimal effort or expense.

But a recommendation does not mean a conclusion; rather, a new starting point to set the stage for further accessibility, continuity, and organization of State of Ohio fiscal information.

Introduction

Problem Statement

In the absence of a single point of reference for all statewide budget and finance information, State of Ohio fiscal and managerial employees in particular are likely missing out on valuable communications and resources to perform most effectively and efficiently. Further, the State of Ohio lacks a central resource to better address a more-unified approach to fiscal-based on-boarding and succession planning.

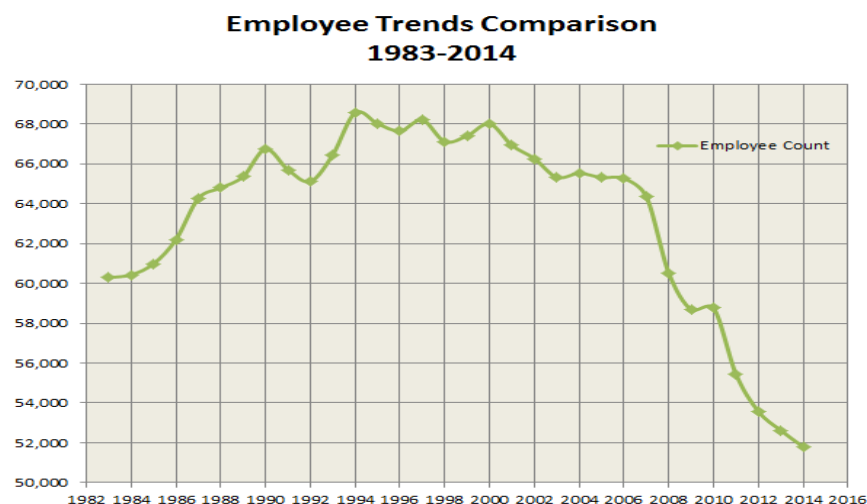
Purpose Statement

The development of the Oh1o Fiscal Resource is a proactive effort to establish a single point of reference for all interested State of Ohio employees on budget and finance matters, to address existing shortfalls in statewide continuity, communication, and education, in addition to fiscal-based on-boarding and succession planning.

Background

The State of Ohio employs thousands across the state. This web-based homepage has the potential to reach and positively-impact every State of Ohio entity and employee.

A growing concern is the overall aging of the existing State of Ohio employee pool. With the steady increase in the number State of Ohio employees that occurred primarily during the 1980s (as illustrated by the Ohio Department of Administrative Services, below), thousands today are either at or are nearing retirement eligibility, many of which who hold fiscal-related positions. Now more than ever is the time to address what could be a devastating loss of a historical knowledge base or at a minimum the familiarity with what State of Ohio fiscal resources are most important and readily-available. As the State of Ohio furthers its do-more-with-less approach (also illustrated below), all employees need to have easy access to information.



The Oh1o Fiscal Resource webpage is an important first step to not only empower existing State of Ohio employees to take on these impending retirement-driven vacancies, but to also assist in the process of on-boarding when outside individuals are hired or existing employees are reassigned. Consolidating and thoughtfully organizing fiscal information and resources into a single webpage will achieve a more unified coordination of personnel-related planning and help pin-point any training needs. The entire State of Ohio will benefit in maintaining a consistent, highly-qualified, in-the-know pool of employees, and potentially reduce the direct and indirect expenses associated with getting those new to a fiscal or management position up-to-speed.

The initial barrier to the success and impact of the Oh1o Fiscal Resource will be the time and effort it will take to market and launch the webpage; to setup a webpage in such a way to immediately convince new users that it will be useful and should be a part of a regular routine. All websites are at risk of becoming stale and useless. So to keep the webpage current and fresh, a maintenance plan has been prepared as part of the recommendation.

Project Mentorship – The FIN SOURCE

Unknown by Team Oh1o when preparing its original capstone case study proposal in March 2015, a project similar to Oh1o Fiscal Resource was underway by OBM – The FIN SOURCE (State Online User Resource for Comprehensive Education). Upon approval by the Ohio Fiscal Academy of Team Oh1o's capstone case study proposal, the team was introduced to Ms. April 'Nikki' Williams, Training Academy Supervisor with OBM. Ms. Williams primarily served as a design lead for The FIN SOURCE, and graciously agreed to act as Team Oh1o's project mentor. Given the parallels of the two concepts there was initial hesitation as to what the launch of The FIN SOURCE in advance of the final recommendation of Team Oh1o's capstone case study would have on the outcome of the Oh1o Fiscal Resource. Though, in the end, interaction with Ms. Williams proved to be a mutually-beneficial pairing of discussion and sharing of ideas, not only strengthening the original concept of The FIN SOURCE, but forcing Team Oh1o to consider all factors and determine whether or not the scope or vision was realistic for initial implementation. Pursuing the original capstone case study proposal as if The FIN SOURCE did not exist, hopefully in the very least will influence The FIN SOURCE by expanding its purpose and strengths as a go-to resource.

The FIN SOURCE can be found at: <http://fin.help4u.obm.ohio.gov>.



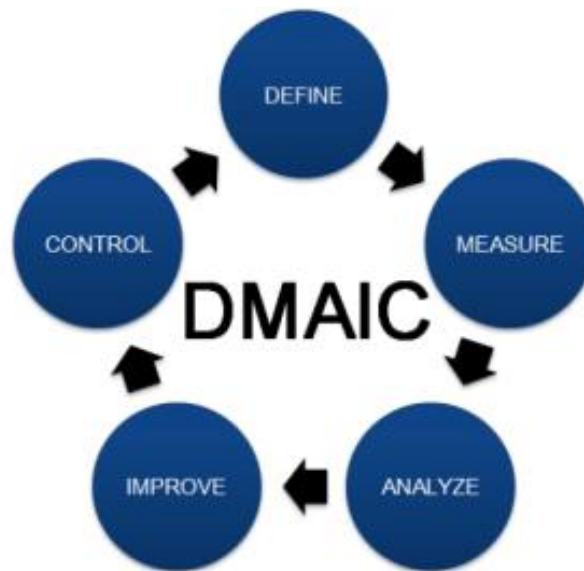
See attachment Exhibit I to review Team Oh1o's feedback provided to Ms. Williams of OBM regarding the then-in development The FIN SOURCE (July 2015).

Approach and Methodology – Process Improvement

The approach to the creation, design, and implementation of the Oh1o Fiscal Resource followed a popular and proven method known as DMAIC. Developed on the basis of Lean Six Sigma principals, DMAIC is a practical and straightforward process to organize an approach to achieve and sustain a desired outcome over an existing obstacle.

Lean Six Sigma – DMAIC

DMAIC stands for – Define, Measure, Analyze, Improve, and Control: *Define the problem, Measure the current state and desired result, Analyze data to further understand the problem, Improve or eliminate the underlying causes of the problem, and Control the process or result for the long run.*



- Define: State of Ohio fiscal online information, though readily-available and generally thorough, is often times found on several independent websites and is not necessarily organized in a user-friendly way. Not only does this increase the amount of time it can take a State of Ohio employee to locate information in order to perform their job, but the likelihood in not recognizing that particular information or resources exist at all is high. Combined, this provides for an environment of wasted time and unpreparedness among both new and experienced State of Ohio fiscal and other employees.
- Measure and Analyze: Interviews of fiscal and managerial colleagues and leadership, in combination with a survey offered anonymously to current State of Ohio employees, has painted a picture of the current position of general difficulty in navigating State of Ohio fiscal information online. Further, this same feedback revealed which existing sites are most frequently used and useful, which existing sites are not on the radar, and how some of the awareness and navigation issues may best be addressed.

- Improve: In pinpointing the causes behind the larger issues of navigating State of Ohio fiscal information online and a lack of general knowledge of existing resources, Team Oh1o's attempt of improvement is the creation of Oh1o Fiscal Resource – a homepage, or portal, of specific links, with easy-to-understand descriptions, to information found on the many, already-existing State of Ohio websites.
- Control: To maintain Oh1o Fiscal Resource as a consistently-current and useful tool long-term, a recommendation is being made to take steps for formal, regular review of the content by appropriate State of Ohio subject matter experts in tandem with a mechanism for webpage users to suggest content additions or changes.

Research Strategies

The recommendation of this homepage culminates after months of exposure, interaction, and research by Team Oh1o. The impetus of this capstone case study was introductions each team member experienced as part of tier one and tier two of the Ohio Fiscal Academy.

Once the problem was defined and verified, research was performed to determine what makes for a good website and a satisfying online experience.

Survey

In an organized attempt to gather feedback from State of Ohio colleagues, Team Oh1o developed a brief survey, using web-based Survey Monkey, with help from Ohio Fiscal Academy cohort members and OBM Training Officer, Mr. Jason Vermilion. In the end, Team Oh1o achieved a quick, unbiased, and straightforward survey. The decision was made to keep the survey anonymous in an attempt to facilitate a comfortable environment in which to provide honest feedback. In an effort to minimize erroneous responses, the survey link was shared with specific lists of State of Ohio employees who primarily hold fiscal-centric positions.

Team Oh1o coupled the survey with in-person interviews with agency chief financial officers, OBM analysts, and selected professional mentors. These interactions served primarily in determining the initial direction or framework for further research. Seeking insight on what statewide fiscal information these individuals utilize on a regular basis and why they utilize them provided the initial momentum for developing the Oh1o Fiscal Resource webpage.

Other States

When considering a change or proposal to an existing format or situation, it is common to seek out whether or not something similar is available or already exists in which to determine feasibility or to model after – a 'do not reinvent the wheel' approach. Team Oh1o researched what other states have available as far as organization of web-based fiscal resources, by both independently performing online searches and in reaching out to central operations (essentially, other states' version of OBM) contacts in each state.

Website Development

The Oh1o Fiscal Resource webpage will be designed with the user in mind. Inexperienced in the art of creating a webpage, Team Oh1o researched what it takes to create a user-friendly website.

Marketing

Often times the shortfall of a web presence is an unsuccessful launch. Even when catering to a captive or specific group, it is important to get the word out and personalize a message of a value added solution to a need in the right way and at the right time. And perhaps most importantly in the case of Oh1o Fiscal Resource, the goal is to achieve mass attention with minimal effort and expense.

Findings

Survey

A total of 110 anonymous responses were collected from the five-question Survey Monkey, which closed on September 18, 2015, after an approximately three-week go-live period. Overwhelmingly, more than three out of four respondents identified State of Ohio websites as a primary means to obtain information in order to complete regular job duties. Related, despite the fact that so many of the survey respondents indicated a high access frequency to State of Ohio websites for fiscal information, more than 45 percent stated that navigating those websites was difficult at best. Comments show a shared frustration of website layouts and the inability to search for specific content, in addition to confusion as to which agency's website contains what information. Finally, when asked what changes or improvements to the existing structure of State of Ohio online fiscal information would be of greatest benefit, more than half of respondents chose the creation of single website that simplifies access to independent resources. Nearly 15 percent of respondents suggested expanded access to information online would improve their performance, which based on other comments collected, is likely a reaction to not knowing what information is already available online or where such information is housed.

See attachment Exhibit II for complete survey results (September 2015).

Other States

Regrettably, research and responses were not as helpful as the survey. There were no obvious examples found of State government websites setup as centralized portals to other sites. It is possible, though, that if such portals exist, those websites may not be accessible to the general public. Similar to how State of Ohio fiscal content is setup with multiple independent websites, most other states appear to follow a disjointed online organizational presence. Feedback offered by representatives from a handful of states confirmed that the concept proposed as the Oh1o Fiscal Resource is not already in place in their respective states. Outside of centralized databases, communication outlets, and public summary sites (similar to the Ohio Treasurer's

online ‘checkbook’), no feedback suggested that all major fiscal resources can be accessed through a central web-based location.

Website Development

There are hundreds of opinions from professional, reputable sources regarding the ‘recipe’ for a successful website. Despite each of these opinions being the ‘correct approach’, most of them reflect a similar philosophy as simply captured in four points by Dayton, Ohio-based Blitz Media Design.

- (1) ‘What’s in it for me?’: It takes a matter of seconds for someone to form an opinion about a website. Given such a short opportunity to capture the interest of a visitor, it is imperative to include thoughtful headers or an ‘elevator speech’ at first view with information on content and purpose. Above all, it is important to be concise and direct, and refrain from lengthy or paragraph-organized content.
- (2) ‘Don’t make me think!’: In keeping with the idea that website visitors want access to information quickly and with minimal effort, simple text and highly-structured content organization is key. Search engines can be useful for sifting through website content, but can also turn some users off due to the additional research component of search results. A ‘billboard’ approach to organizing content has been identified as most beneficial to viewers.
- (3) ‘Avoid visual clutter.’: Empty space on a website is okay. Excessive content, graphics, or other features can be overwhelming to users. It is best to keep it simple, satisfy the needs of the users – nothing more, nothing less. The more content arranged on a single webpage, the less users are likely to see.
- (4) ‘Content is king.’: When it comes to formatting and branding, keep it familiar and simple. Lead with the content and determine the aesthetics later.

Another universal method to a successful online experience is the widely-adopted ‘Three-Click Rule’. Many web developers have written on this subject, including Jeffrey Zeldman, who wrote in his book, *Taking Your Talent to the Web*. Zeldman states, ‘[The Three-Click Rule is] based on the way people use the web (and) can help you create sites with intuitive, logical hierarchical structures’. This website design rule of sorts suggests that all content of a website should be retrievable with a maximum of three clicks. The underlying concept is that users will start to become frustrated or even abandon a website if they have to navigate, or click, through several pages or sub-links to find information.

In taking a closer look at major State of Ohio agency-level websites, whether or not by design, most contain retrievable content within three or four clicks; that is, if you know exactly where the information is that you are looking for. Though, despite this relatively easy access to information on individual websites as far as clicks, navigation is varied across the board as well as feel, or branding, and use of headers and terminology.

Finally, taking into consideration the desire for the Oh1o Fiscal Resource to be mobile-friendly, Team Oh1o discovered 'HTML5'. Released in October 2014, HTML5 is a 'markup language used for structuring and presenting content on the World Wide Web' enabling seamless mobile-capability of websites.

Website development is not a one-and-done process as emphasized by many professional web developers. Rather, website development should be continuous, driven by visitor activity, to keep the website relevant and useful. As advised by an article on Gartner, *When, Why, and How to Do a Website Review*, the effectiveness of the page design, site structure, interaction flow, marketing message, and value proposition are in getting users from the landing page to their desired location. The only way to know this truth is to gain access to the traffic logs and analytics tools. 'Getting to the truth of a website by looking at the design of the homepage is like a restaurant reviewer getting to the truth of the menu by looking at pictures of food. Ultimately, the effectiveness of the website depends on what users do (objective data about user behavior) rather than what reviewers think (subjective opinion).'

Marketing

Although not a traditional product or service, the launch of Oh1o Fiscal Resource, or any new information-driven webpage, can benefit from a similar marketing strategy. As nicely summarized by Drew Gannon of Inc.com, it is all a matter of endorsement, exposure, and personalization.

- (1) 'Design a Campaign with Built-in Motivation': Gannon states, 'In order to make a new product something customers can't live without, it needs to serve a purpose in your customer's life. Defining that purpose depends on your individual product's functionality.'
- (2) 'Focus on the Descriptors in Your Marketing': It is important when launching or marketing something new to 'build consumer understanding from nothing', says Gannon. It is never a good idea to build upon a strategy with an assumption that who you are marketing to has any foundational knowledge. Though, choosing the right combination of branding and words is more an art form than a science that needs to be adjusted over time. As according to Gannon, 'Sometimes, regardless of how much thought you put into your original ideas, branding becomes an evolution over time.'
- (3) 'Prove That it Works': This statement says it all. New consumers and users want proof ahead of time that a new product, service, or website does what it claims it can do.
- (4) 'Personalize It': Consumers or users are savvy, and for all intensives purposes a bit selfish. By marketing in a targeted way that triggers a sense of individualized outreach, promoting a sense of 'I need this' by a consumer or user, is more likely to achieve a more positive result – consumer or user 'buy in'.

Conclusion

In researching a hunch of a greater need among State of Ohio employees, Team Oh1o concluded that the creation of a fiscal homepage, or portal, consisting of familiar language and terms, direct links to already-existing websites, and that is mobile device-friendly, would benefit the entire State of Ohio fiscal structure, improving productivity as well as enhancing on-boarding and succession planning activities.

Recommendations

Scope of Purpose

When originally considering this concept, the intent was to create a site as a launch point for all other State of Ohio fiscal access. Further to create a site that contained announcements and an interactive ‘HelpDesk’ modeled experience, as included in Team Oh1o’s initial proposal in March 2015:

‘This proposal [to create a new fiscal homepage or portal] includes an interactive component such as alerts and announcements, in addition to a calendar of important fiscal-related deadlines and events. Further, a fiscal ‘Help Desk’ feature is being considered where State of Ohio employees can be directed timely to subject matters experts, as well as a ‘chat’ feature for more informal information sharing.’

In extended contemplation of existing and then-in development online resources (The FIN SOURCE), as well as cost and maintenance considerations, it became clear that although not completely out of the realm of possibilities, the original proposal of a daily-updated and interactive webpage may be too aggressive for an initial concept. The goal is to conceptually offer a realistic recommendation to improving the organization of State of Ohio fiscal resources without duplication or excessive effort.

See attachment Exhibit III to compare Team Oh1o’s original capstone proposal (March 2015) with its final recommendation (October 2015).

Access, Content, and Design

Access – On the basis of the survey of current State of Ohio fiscal and managerial employees, the response overwhelmingly suggested that myOhio.gov is the website used most frequency, primarily to access OAKS and BI Cognos. That being the case, it is recommended that the Oh1o Fiscal Resource webpage be a link from myOhio.gov to capitalize on existing web presence and traffic. Further, the link will be accessible without requiring a login, via an addition to the header drop-downs/links.

Although unlikely that many non-State of Ohio employees visit the myOhio.gov website, a larger or secondary goal of the Oh1o Fiscal Resource is to offer ease of access to information and transparency to anyone interested. Also, linking the Oh1o Fiscal Resource webpage from the pre-login myOhio.gov screen will enable access to the portal even during circumstances of most myOhio.gov technical issues and when employees experience any other login-related difficulties.

attempt to mirror common stream of consciousness or thought processes to help users access specific information, very similar to the feel of the new cascading menus found in OAKS.

Below are simplified examples of cascading menus for conceptual purposes, using common terms and language, and emphasizing how some content of a single subject matter can be located within multiple independent State of Ohio websites:

Best Practices & Process Improvement

Initiatives

Ohio's Common Sense Initiative → Direct Link to Ohio Governor

Enterprise Initiatives → Direct Link to OBM (Value Management)

Resources & Training

Agency Best Practices → Direct Link to TBD OFA Cohort 4 Website

Kaizen / Lean Six Sigma → Direct Link to LeanOhio

Budget Information

Operating Budget

Current

Guidelines → Direct Link to OBM

Active Budget Bill Search → Direct Link to The Ohio Legislature

Analysis → Direct Link to Ohio Legislative Service Commission (Greenbooks)

Codes, Legislation, & Rules

Administrative/Revised Code Search → Direct Link to LAWriter

Bill Search → Direct Link to The Ohio Legislature

Rule Review → Direct Link to Joint Committee on Agency Rule Review

Controlling Board

Home Page → Direct Link to OBM

Directives & Policies

Procurement → Direct Link to DAS (Directives)

Travel → Direct Link to OBM (Travel Rule)

Recognizing the continuous-improvement aspect of the Oh1o Fiscal Resource, there will be a mechanism in place for users to provide recommendations for webpage changes and perhaps more importantly, additions to content. Similar to what is currently available on The FIN SOURCE, it is recommended that feedback and suggestions be facilitated using an e-mail account setup specifically for the Oh1o Fiscal Resource review panel (see Recommendations – Maintenance). Oh1o Fiscal Resource users will have easy access via a link that will automatically create a new e-mail based on the user's computer default settings.

Design – Branding and layout will mirror myOhio.gov. Providing a webpage with a familiar feel and seamless access will automatically facilitate a level of comfort for users and therefore encourage quick adoption of the webpage and increase likelihood of regular use.

The myOhio.gov homepage already serves as a mechanism for relaying both fiscal and non-fiscal announcements and news primarily to State of Ohio employees. To create another site also with an announcements and news feature could be confusing and duplicative, or be even more time consuming for users.

In addition to a no- or limited-scroll, straightforward, uncluttered layout for traditional viewing from a personal computer, it is recommended that the full content of the Oh1o Fiscal Resource webpage be easily accessible on a mobile device or smartphone. In light of the on-the-go, twenty-four-seven culture that exists today – even when it comes to State government – access to legible information at one's fingertips is important, and practically expected. To achieve this, it is suggested that the webpage be setup using HTML5.

Speaking again to branding, the name itself of the webpage – Oh1o Fiscal Resource – was designed to be easily and subtly adjusted to accommodate any future adaptations or additional uses without interrupting familiarity. Should it be determined at some point that the webpage be expanded to serve as a portal for both fiscal and non-fiscal content, Oh1o Fiscal Resource can be seamlessly re-named Oh1o Resource, to represent the larger spectrum of access to information.

Marketing and Launch

The entirety of the final agreed upon concept of the Oh1o Fiscal Resource is to provide a resource or service at little-to-no cost to State of Ohio agencies and taxpayers. This is especially the case to market and launch this webpage. The recommendation is to limit the website marketing and launch to a paper-free digital format from a variety of sources.

It is first important to consider the launch timing. Getting the attention of State of Ohio employees – especially fiscal – can be tricky at certain times of the year due to tasks on hand with firm deadlines (for example, biennial budget preparation) and regular fiscal year requirements that increases workload (for example, State fiscal year-end closeout). If there is any a time when fiscal activities are at a comparative lull, it is generally December through March. So, it is recommended to market and launch the Oh1o Fiscal Resource during that time frame. Otherwise marketing and launch efforts may be ignored or overlooked.

In researching various marketing techniques, including those specifically applicable to launching a new website, a common theme is that consumers or users gravitate towards the familiar, but pay more attention to the unique. Using such a formula has the potential to achieve a broader impact. Many State of Ohio employees already check the myOhio.gov homepage for various announcements and technical information. An announcement feature of the Oh1o Fiscal Resource in advance of the launch could spark initial interest. As part of the announcement on the myOhio.gov homepage would be a link to a brief video message and presentation, introducing the new website and explaining the purpose and value-added qualities it offers. It is recommended that the video message be provided by a recognizable member or members of the State of Ohio leadership team, rather than a faceless digital voice simulation or unknown actor. The message should be up-beat and viewer-centric, highlighting the features and purpose of the new webpage and providing specific examples as to why it is not just another State of Ohio website, but rather a resource designed and consistently re-tooled for accuracy and user benefit.

Often times, though, State of Ohio employees do not look outside their respective agencies for announcements and news. To address this, it is recommended that the video message link be provided directly to all agency chief financial officers to be mass emailed to all of their respective agency employees or added as part of their agency's own online internal outlet for announcements. Further, it is recommended that agency offices of human resources include mention or information on the Oh1o Fiscal Resource as part of their existing new hire materials, so that webpage awareness continues for those who may have missed the initial launch.

Maintenance

Second to a successful launch of a new website is to maintain the site so that it continues to be fresh and relevant, to further its original intent or mission over the long-term. Existing staff at OBM in partnership with their colleagues at the Ohio Department of Administrative Services (DAS) Office of Information Technology (OIT) will be tasked with maintaining the content and functionality of the Oh1o Fiscal Resource webpage on a continuous basis.

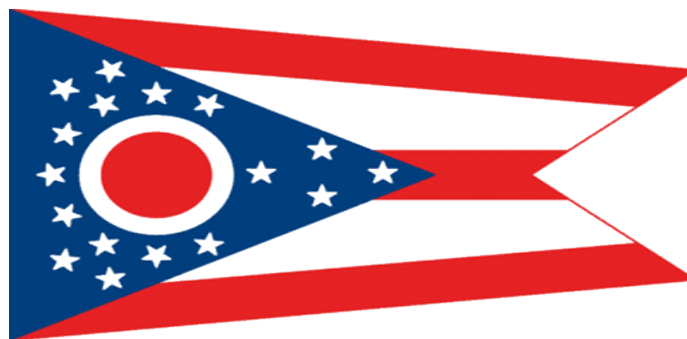
A panel of sorts, rotating annually, consisting of OBM analysis and Ohio Fiscal Academy alumni will be responsible for meeting formally monthly to consider any requests to add or change content, proactively determine any additions or changes to content, as well as review activity records provided by DAS OIT as an additional factor in the decision-making process of updating the webpage.

The Ripple Effect

Ripple Effect, defined as an 'indirect effect that spreads out from the direct or main effect to reach areas or population far removed from its original purpose or target'.

All in all the State of Ohio offers a significant amount of quality data and fiscal information online for its employees. The challenges, though, are: (1) varying levels of organization amongst independent websites may reduce user frequency or 'traffic', (2) knowing which agency is responsible for providing what information can limit a user's access to or knowledge of resources available, and (3) content on individual agency websites can go unrecognized as being duplicative, outdated, or stale. The Oh1o Fiscal Resource has the potential to address each of these challenges. Taking that first step to align content by subject rather than by agency, to take the guess work out of navigating existing online State of Ohio fiscal information by way of user-friendly access to direct links, and to increase traffic to what could be otherwise underutilized existing webpages, can drive a statewide push towards a unified – One Ohio – approach to an online presence. With increased exposure and organization offered by Oh1o Fiscal Resource, individual agency websites will be forced to be more accountable and user-centric. Expanded branding unification and navigation similarities among individual State of Ohio websites can help breakdown the existing silos and short-sightedness that currently exists in the State of Ohio's overall online presence, and can improve transparency and customer service.

The possibilities for improvement are vast, and the Oh1o Fiscal Resource may be that new starting point to help get us there!



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Acknowledgement and Thanks

Team Oh1o would like to thank our fellow State of Ohio employees who in one-way-or-another helped make this capstone case study possible. We would like to especially acknowledge Ms. April 'Nikki' Williams and Mr. Jason Vermillion of the Ohio Office of Budget and Management, guest presenters for and members of Ohio Fiscal Academy Cohort 5, Ohio Fiscal Academy alumni, as well as our colleagues, leadership, and mentors at our respective agencies – Ohio Department of Higher Education (Ohio Board of Regents), Ohio Department of Mental Health and Addiction Services, Ohio Development Services Agency, and Ohio Industrial Commission.

Exhibit I

Ohio Fiscal Academy Team Oh1o The FIN SOURCE Feedback – 07.01.2015

Branding / Website Ownership:

In its current state, it is not obvious that The FIN SOURCE is an official State of Ohio website (or is it not?). Without any recognizable already-existing State branding/logos/etc. on the site, it is not obvious as to whether or not this public site is 'reliable' or of a trusted source. If The FIN SOURCE is going to be maintained by OBM, maybe it should be branded and organized similar to the OBM website. Also, there is currently no 'Contact Us' option.

Access to Information / Website Setup:

A no-scroll main page would be ideal and more user-friendly to visitors of the site. The way The FIN SOURCE is currently setup the header and explanation take up too much valuable real estate with the quick links hidden at the bottom of the page. One suggestion might be to replace the 'button' links with header ribbons with more detailed drop-down menus, again, similar to how OBM's website is setup.

Although we understand the goal of The FIN SOURCE to increase use of the FIN and SAFE manuals, we do not think the manuals should dominate the site. Each link should have equal emphasis/real estate on the page.

The left-hand vertical navigation is overwhelming. If the page itself is well organized already, it takes away from a cleaner navigation of the site. We suggest limiting such a detailed navigation to only when the FIN and SAFE manuals are selected. Further, a visitor to the website wanting to access the left-hand vertical navigation should not have to perform any right/left scrolling to be able to see all of the text.

The two 'Search' options at the top of the webpage are confusing. Do they serve different purposes?

If the intent of The FIN SOURCE is to provide essentially more 'generic' quick links, it would be beneficial to include explanations as to what kind of information is offered on each site. For example: Ohio.gov is currently a quick link... Why? Is there something particularly valuable on that site that The FIN SOURCE wants to bring to the site visitors' attention?

As discussed previously, for The FIN SOURCE to be mobile device adaptive would be ideal provided more-and-more State of Ohio employees are obtaining data and information 'on the go'. *HTML5!*

New / Returning User Appeal:

The FIN SOURCE in its current state is not overly-appealing in a way that may capture the interest of visitors to the page. We like the look of the Joint Committee on Agency Rule Review (<http://www.icarr.state.oh.us/home>) and Treasurer of Ohio (<http://www.tos.ohio.gov/>) homepages with their use of color, movement, and an interactive component. Maybe The FIN SOURCE homepage could include a short welcome/purpose/how-to-navigate video in lieu of the current text?

Limit the use of acronyms or at least define them. OAC and ORC are two examples on the current site. We think The FIN SOURCE should cater to visitors of all levels of State of Ohio government familiarity and use of too many acronyms may turn off those that are unfamiliar or just starting employment with the State. *(On a related note, we feel the OAC and ORC links can be combined and re-labeled as they essentially both take you to the same place).*

Existing / Suggested Links:

Ohio DAS Directives – This quick link button may need to be re-named as it does not take you to ‘directives’. Replace ‘Directives’ with ‘Policies’, maybe?

NASBO – Without clicking on the link none of us knew what ‘NASBO’ was. Collectively, after reviewing the NASBO website, we could not identify/recognize the need or value in directing visitors to it.

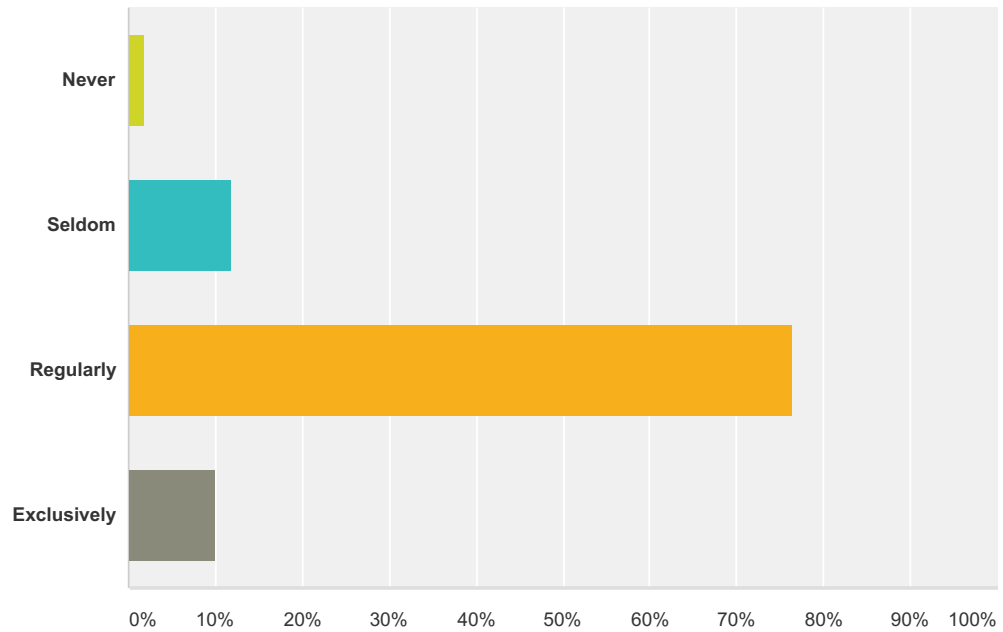
Other important links to sites and information we suggest including on The FIN SOURCE are:

- myOhio
<https://omyohio.oaks.ohio.gov/>
(especially if the goal is to drive traffic to myOhio for announcements/news/etc.)
- e-Controlling Board
<https://www.ecb.ohio.gov/Public/Default.aspx>
- Legislative Service Commission
<http://www.lsc.ohio.gov/>
(for information such as green books, red books, etc.)
- Joint Committee on Agency Rule Review
<http://www.icarr.state.oh.us/home>
- The Ohio Legislature
<https://www.legislature.ohio.gov/>
- Treasurer of Ohio
<http://www.tos.ohio.gov/>
(with The FIN SOURCE being a public site, the Treasurer of Ohio website offers many transparency-type resources that may be of interest to the general public)

Exhibit II

Q1 I rely on State of Ohio websites to access financial information to perform my regular job duties.

Answered: 110 Skipped: 0

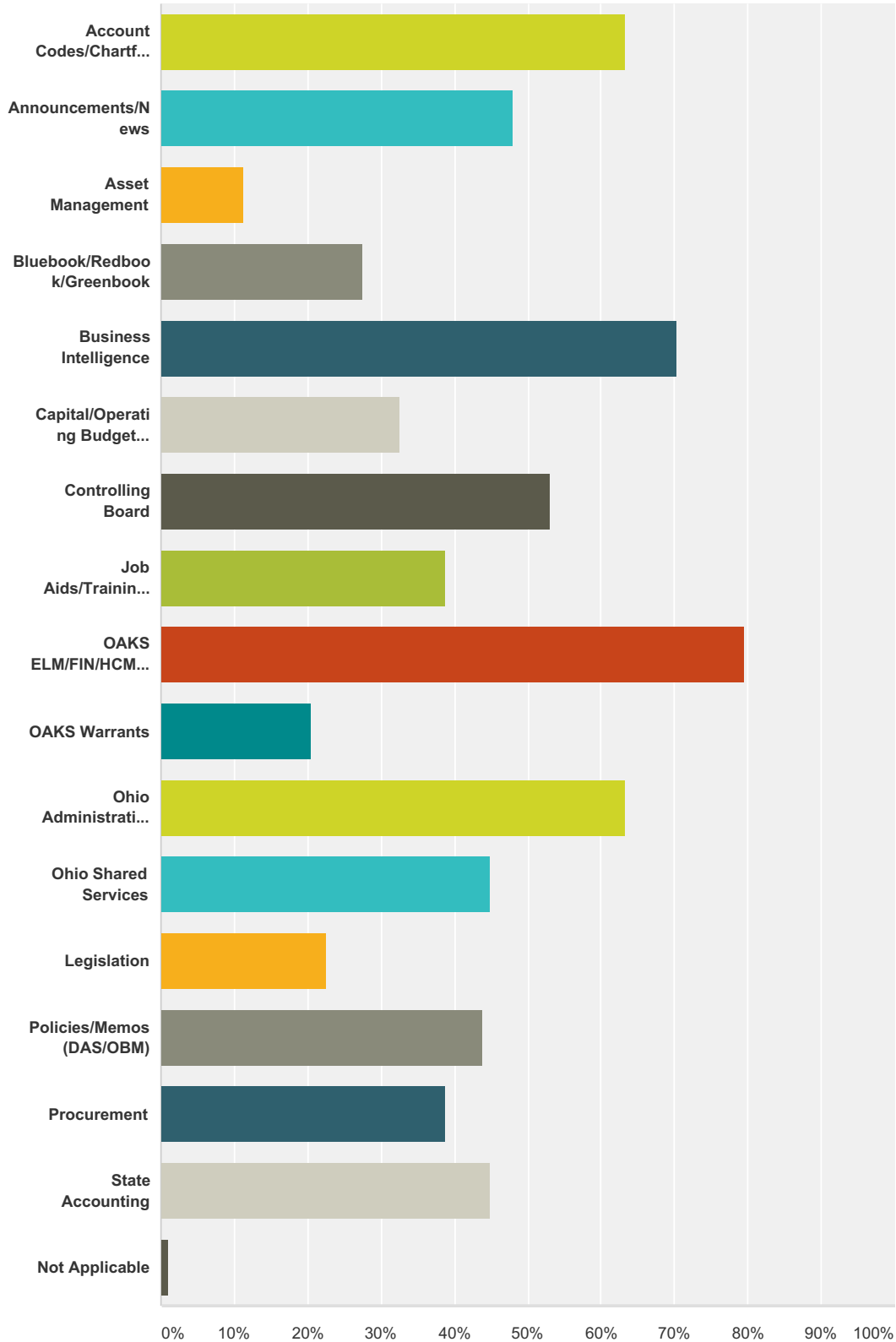


Answer Choices	Responses	
Never	1.82%	2
Seldom	11.82%	13
Regularly	76.36%	84
Exclusively	10.00%	11
Total		110

Q2 What fiscal information or websites do you frequently access (check all that apply)?

Answered: 98 Skipped: 12

State of Ohio Fiscal Information Survey



Answer Choices	Responses
Account Codes/Chartfields	63.27% 62
Announcements/News	47.96% 47

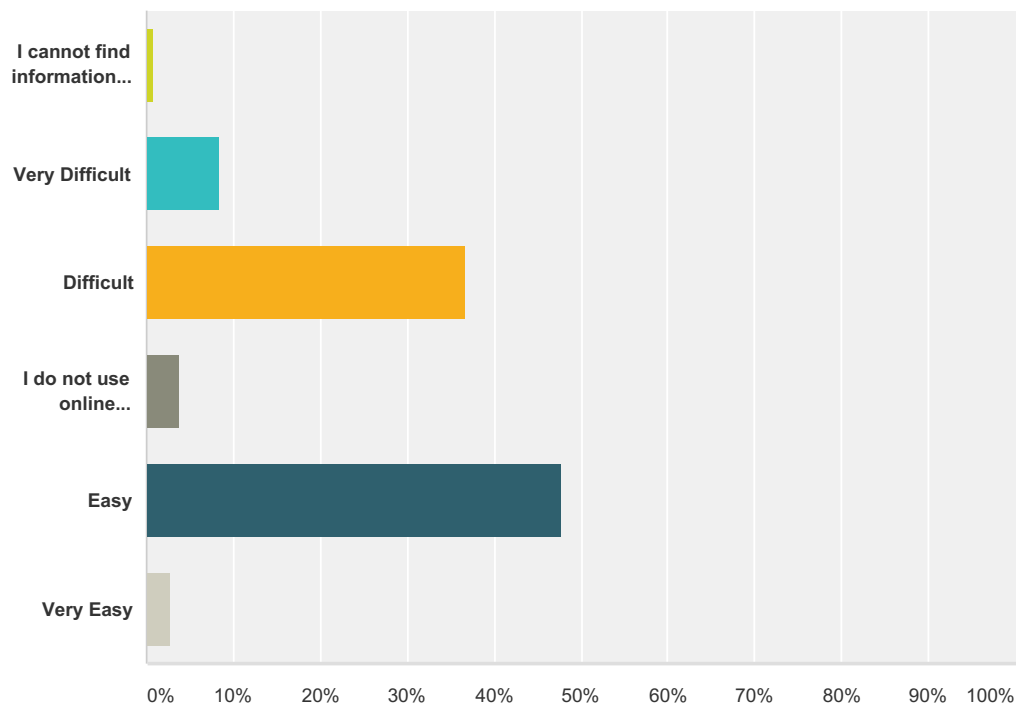
State of Ohio Fiscal Information Survey

Asset Management	11.22%	11
Bluebook/Redbook/Greenbook	27.55%	27
Business Intelligence	70.41%	69
Capital/Operating Budget Information/Guidance	32.65%	32
Controlling Board	53.06%	52
Job Aids/Training Opportunities	38.78%	38
OAKS ELM/FIN/HCM (myOhio)	79.59%	78
OAKS Warrants	20.41%	20
Ohio Administrative Code/Ohio Revised Code	63.27%	62
Ohio Shared Services	44.90%	44
Legislation	22.45%	22
Policies/Memos (DAS/OBM)	43.88%	43
Procurement	38.78%	38
State Accounting	44.90%	44
Not Applicable	1.02%	1
Total Respondents: 98		

#	Other information and/or specific website(s), please list:	Date
1	County Finance Information System	9/10/2015 9:00 AM
2	I also will from time to time look at the Ohio Treasurer's website for various fiscal information. I also refer to my agency's website for various policy directives.	9/10/2015 8:54 AM
3	Accounts Payable, Commitment Control, General Ledger, and Reporting Tools	9/10/2015 8:53 AM
4	LSC for bills at the legislator	9/10/2015 8:50 AM
5	HEI, OBM forms	9/4/2015 10:17 AM
6	OAKS CI	9/3/2015 1:50 PM
7	AOS & AG's office	9/3/2015 1:41 PM
8	www.gsa.com - travel reimbursement rates; unspsc.org - codes	8/28/2015 2:08 PM
9	Pay classifications and pay rate tables	8/28/2015 12:58 PM
10	Legislative Service Commission - detailed spreadsheet	8/28/2015 10:11 AM

Q3 How easy is it to navigate most State of Ohio websites to find fiscal information?

Answered: 109 Skipped: 1



Answer Choices	Responses
I cannot find information that I am looking for	0.92% 1
Very Difficult	8.26% 9
Difficult	36.70% 40
I do not use online resources to look for fiscal information	3.67% 4
Easy	47.71% 52
Very Easy	2.75% 3
Total	109

#	If you answered I cannot find information that I am looking for, Very Difficult, or Difficult for question 3, please tell us the type of information you cannot find or are having difficulty finding and why?	Date
1	State website pages are not easy to navigate in general.	9/16/2015 1:59 PM
2	individual websites, website changes and previous links not working, etc.	9/15/2015 3:22 PM
3	We sites tend to have so much information it can be hard to find what you want. I have always been disappointed with the search abilities within state web sites.	9/15/2015 9:51 AM
4	I need to qualify the "difficult." It is at times because not sure if what I need is on DAS or OBM or State Accounting websites. It's also time consuming because there is no one place I can go to - then choose the next appropriate route. I have to have all the websites in my "favorites" to shorten the research time. How about a central portal to get to all?	9/10/2015 1:21 PM
5	Many sites are easy, but DAS Procurement is particularly difficult to navigate and some OBM pages are difficult as well.	9/10/2015 1:02 PM

State of Ohio Fiscal Information Survey

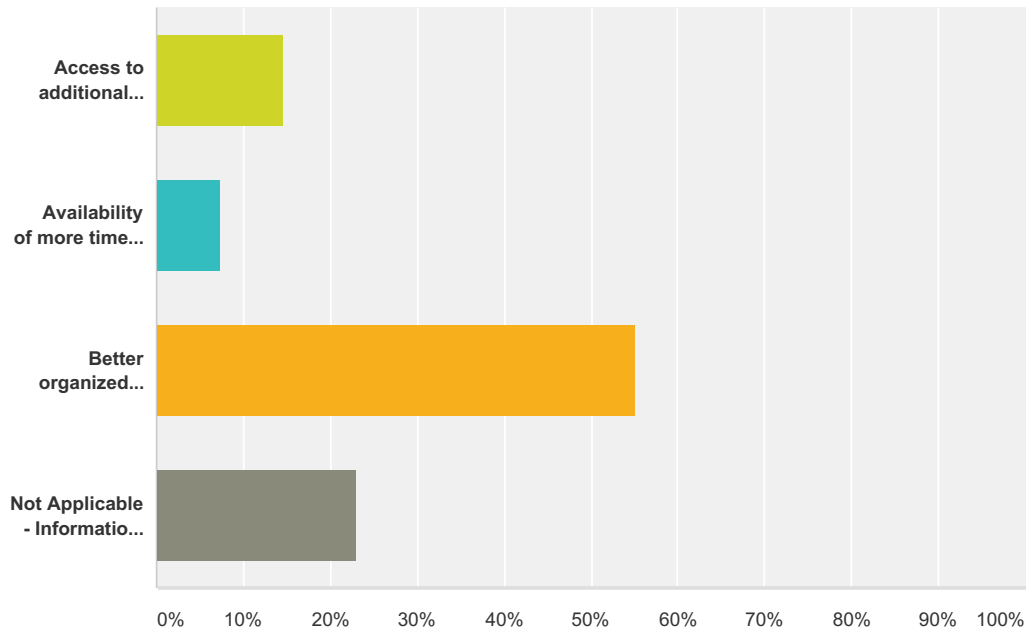
6	It can be difficult to navigate all the different websites and find the information you need. For example; the required pre-requisite search for availability with state resources that are themselves each housed at different sites(OPI, CRP, etc..). Yes a portal is a great idea! And in a high-level; dream world; it would be great if there were a better search engine for the state procurement site. Where you could type in a keyword search for specific items on state term contract. I know the Ohio Marketplace is a start for this 'smart search', and it is an expensive thing to do well.	9/10/2015 11:52 AM
7	I wouldn't say it's "easy" but I wouldn't describe it as being difficult. Some of the user interfaces could be easier to navigate. The ELM section is difficult to navigate.	9/10/2015 11:03 AM
8	Not everything is in one central place; state purchase guidance/rules documents conflict with each other.	9/10/2015 10:02 AM
9	I find it difficult to use the DAS Current Contract search function. I also, find the DAS website not to be user friendly.	9/10/2015 9:52 AM
10	One example is the useful life table (depreciation schedule) maintained by Asset Management. To find this table, you have to know to go to DAS > General Services Division > Asset Management Services and then find a link called "Profile ID's". This file name is in no way intuitive and does not tell most users what information the file contains - I found it by clicking every link on the page until I found what I was looking for.	9/10/2015 9:32 AM
11	The difficulty in utilizing the appropriate online fiscal resources is not necessarily the navigation; rather, it is the number of sites that must be referenced. There is definitely a learning curve for new fiscal employees as it pertains to where to look for specific information.	9/10/2015 9:26 AM
12	The recent upgrades in OAKS seem to, if anything, slow me down. Obviously, it might take some getting used to but it seems to be several extra clicks to get to the same information. I am not able to find from a voucher in my worklist how to get to the actual voucher itself. There used to be a clear "access voucher pages" but I cannot find something similar in the new system. I am hoping I do not have to log into a separate program to get to the purchase req's as that has been promised for a while.	9/10/2015 9:17 AM
13	At times it can be difficult to navigate, mostly to do the difference in formats on each site. Depending on the information desired it is difficult at times to know if I'm looking in the wrong place or it is simply not available.	9/10/2015 9:14 AM
14	The underlying logic for the State's websites escapes me. I cannot guess where similar types of information will be because one will be one place and the other will be in a very incongruous place. If I lost my bookmarks, I would be a hurting unit because the search features all suck. This is why some of my colleagues still rely on printing things out/paper. They can trust that they know where the paper file is and they would rather rely on that paper than spend 30 minutes looking up the information online - even if the paper is out of date.	9/10/2015 9:06 AM
15	When looking for some information, such as corrections to deposits and coding issues, I find it difficult to find the information I need quickly. Time is of the essence so I want the information without having to actively search for 15-20 minutes.	9/10/2015 8:58 AM
16	Many things have not been updated. It is hard to find the right BI reports because the report books are not updated. Some information related to procurement and state contracts are on DAS while other important information is on OBM's site. I know there are improvements on the way with the FIN upgrade completed.	9/10/2015 8:55 AM
17	Most information is readily accessible online. One item possibly worth of discussion. Due to the volume of e-mails that OBM sends to agencies, it would be great if there was a central historical database for those e-mails. Particularly, when transferring agencies, as sometimes it takes a while for the new e-mail address to get registered for the various list serves that OBM has.	9/10/2015 8:54 AM
18	Sometimes running reports in OAKS Financial is difficult because you have to click through several different folders to get the report you need.	9/9/2015 10:39 AM
19	As a representative from a smaller college, I access lots of different pieces of information for my difference job tasks. I do not feel I'm in each system enough to understand how to get the information I need. I am not trained enough in any of the systems to know how to use.	9/4/2015 11:42 AM
20	The only one I usually have difficulty with is the HEI webpage.	9/4/2015 10:17 AM
21	The information on the OBM site is difficult to find. It is not organized in a user-friendly approach. Many times I have to call someone to help me find the information or provide the information over the phone.	9/3/2015 4:14 PM
22	Suggestion - I think it would be great to have one BI report that would provide both PO and Voucher info. against a requested ALI. This could aid in monthly reconciliation. Something as simple as below, but could also have financial info. ALI POs Vouchers C12345 0123456789 C12345 0123456790 12345678 C12345 0123456790 12345685 C12345 0123456790 12345690 C12346 2345678901 C12347 3456789012 23456789 C12350 4567890123 C12352 5678901234 34567890 C12352 5678901234 34567899 C12360 6789012345 C12367 7890123456 45678901	9/3/2015 2:53 PM
23	The information is not to hard to find	9/3/2015 2:44 PM

State of Ohio Fiscal Information Survey

24	There is not a lot of information regarding OAKS and Controlling Board requests that specifically pertain to colleges and/or 2 year colleges. We tend to do things in a different way and trying to find information that pertains to the things we do and the way we do it can be difficult. Most of the information is geared toward the regular state agencies and it is somewhat difficult to determine if we should be following those procedures or not.	9/3/2015 1:43 PM
25	I have mixed feelings about my response because it all depends on what website you are working in and what information you are trying to access. DAS purchasing site is not user friendly in my opinion, however OBM/OSS's websites are more clearly defined as to where to locate what information you are looking to find.	8/28/2015 4:56 PM
26	Procurement.ohio.gov - you cannot access the RFP documents once a contract is awarded, however this document is considered a part of the contract and can contain necessary information. Search function in general is not very accurate No instructions regarding issues in posting to bids/RFPs to DAS website MBE set-aside information - buried in the procurement manual and does not include exemptions Key documents are not moved from announcements section of procure.ohio.gov site to a reference material (i.e. biennial DAS blanket release & permit memo) To explain to new employees to public procurement, our guidelines are spread out in multiple documents on multiple sites. Also, there is no clear written documentation to the exemptions to the rules.	8/28/2015 2:08 PM
27	Most things are easy to find unless it's "somewhere on OBM's website." Budget information, payroll information such as the "letters", rates, etc. have always been difficult to find.	8/28/2015 1:44 PM
28	Locating information INITIALLY can be difficult if you are unsure, "how", that which are looking for is worded. Once you have eliminated several possibilities, it becomes easier to narrow in on your objective and when it is found, just book mark the page!	8/28/2015 9:53 AM
29	I only answered Easy because I know where to look on each website. If I did not know what section or area to look for information, this would have been a much different answer.	8/28/2015 8:20 AM
30	Sometimes difficult in remembering in which location the info is kept. A lot of clicking is needed before finding what was being searched for.	8/4/2015 9:24 AM
31	At times when I am seeking OBM policy information, it is necessary to go to their different web pages to access that information. The DAS website is very hard to navigate and the search engine is not very helpful. OBM does a nice job with their forms and redirecting you to OSS for the forms they maintain.	8/4/2015 8:56 AM
32	Once finding the site needed the navigation & tryin to figure out where I go from there is time consuming. Links to all info wb b great all on one site.	7/30/2015 1:53 PM
33	Difficult to maneuver through various websites	7/30/2015 12:56 PM
34	It is often times cumbersome to navigate any independent State of Ohio website when attempting to access news and resources. Often times the difficulty is simply knowing what resources are available.	7/30/2015 12:47 PM

Q4 How could State of Ohio financial information and resources be made more useful to you? (Select one)

Answered: 109 Skipped: 1



Answer Choices	Responses
Access to additional information online	14.68% 16
Availability of more timely information	7.34% 8
Better organized website to simplify access to independent resources	55.05% 60
Not Applicable - Information is currently in a manner that is useful for me or I do not use online resources to look for fiscal information.	22.94% 25
Total	109

Exhibit III

Ohio Fiscal Academy – Cohort 5 Team Oh1o* Capstone Project Proposal

Project Title:

Oh1o Fiscal Home Page

Background:

In an effort to promote accuracy, continuity, and efficiency across all layers of State of Ohio fiscal management, Team Oh1o has identified a need for the development of a fiscal ‘home page’ or ‘portal’ to be made available to all State of Ohio employees – a ‘One Ohio’ approach to budget and finance. This web-based platform will be a highly-organized, continuously monitored-and-updated environment that will make primarily already-existing State of Ohio resources and independent sites available from a single location. Examples include direct links to active and/or recent legislation, specific statewide guidance, policies, and procedures, as well as publications released from various State entities during the biennial budget preparation. This proposal includes an interactive component such as alerts and announcements, in addition to a calendar of important fiscal-related deadlines and events. Further, a fiscal ‘Help Desk’ feature is being considered where State of Ohio employees can be directed timely to subject matters experts, as well as a ‘chat’ feature for more informal information sharing.

The goal of creating an all-encompassing interactive home page of State of Ohio budget and finance resources is to better equip all State of Ohio employees regardless of location or position with a one-stop connection to the many valuable resources already available that may otherwise be unknown or difficult to navigate. This home page will empower both fiscal and non-fiscal State of Ohio employees with expanded knowledge enabling them to perform at a higher-level, and perhaps more importantly better prepare them to take on new or promotional opportunities as part of a statewide succession and on-boarding plan.

Functionally-speaking, this home page will cater to the wide-range of ‘traditional’ fiscal State of Ohio employees. Though, as a proposed protected site accessible by all – and only – State of Ohio employees, it will also serve as a straightforward, easy-to-navigate resource for leadership and management, and non-fiscal employees.

Problem Statement – In the absence of a single point of reference for all statewide-applicable budget and finance-related information, State of Ohio fiscal employees and management are likely missing out on valuable communications and resources to perform most effectively and efficiently.

Further, the State of Ohio lacks a central resource to better address fiscal-based succession planning and more-unified on-boarding.

Purpose Statement – The development of the Oh1o Fiscal Home Page is a proactive effort to establish a single point of reference for all interested State of Ohio employees on budget and finance matters, to address existing shortfalls in statewide continuity, communication, and education, in addition to succession planning and on-boarding.

Research Strategies:

The development of this home page will culminate after months of exposure, interaction, and research by all Team Oh1o members. The impetus of this capstone project were introductions each team member experienced as part of Tier One of the Ohio Fiscal Academy in February. With a broad range of experience and responsibilities, each member of Team Oh1o walked away from Tier One having learned *something* new. When the team came together it collectively questioned ‘what else don’t we know?’ and ‘what other resources are available to us that we aren’t familiar with that we should be?’

Interviews with our agency Chief Financial Officers, Office of Budget and Management Analysts, and selected mentors will serve as the initial direction or framework for further research. Seeking insight on what statewide-applicable resources these individuals utilize on a regular basis and why they utilize them will provide the initial momentum for developing the Oh1o Fiscal Home Page.

It has been brought to the attention of Team Oh1o by the Ohio Fiscal Academy that a project similar to the Oh1o Fiscal Home Page is being worked on – or at least being considered – by the Office of Budget and Management. Once a connection is made, one or two of these persons involved may be able to serve as a project mentor; a potentially mutually-beneficial pairing of discussion and sharing of ideas.

Organizational Assessment:

The State of Ohio employs thousands across the state. This web-based home page has the potential to reach and positively-impact every State entity and employee.

A growing concern is the overall aging of the existing State of Ohio employee pool; thousands either are at or are nearing retirement eligibility, including those in fiscal-related positions. Now more than ever is the time to address what could be a devastating loss of a historical knowledge base. The Oh1o Fiscal Home Page is an important first step to not only prepare existing State of Ohio employees to take on these retirement-driven vacancies, but to assist in the process of ‘on-boarding’ when outside individuals are hired. Consolidating fiscal resources and information into a

single site, will achieve a more unified coordination of succession planning and training. The entire State of Ohio will benefit in maintaining a consistent, highly-qualified, in-the-know pool of employees, and potentially reducing the direct and indirect expenses associated with getting those new to a fiscal or management position up-to-speed.

The initial barrier to the success and impact of the Oh1o Fiscal Home Page will be the time and effort it will take to roll out and market the site; to setup a site in such a way to immediately convince new visitors that the page will be useful and should be a part of a regular routine. All web-based sites are at risk of becoming stale and useless. So to keep the site current and fresh, a maintenance plan will be developed as part of the capstone project.

Scope of Project:

All six members of Team Oh1o will participate in the research and development of the proposed Oh1o Fiscal Home Page. The team will interact frequently via e-mail, telephone, and the Ohio Fiscal Academy SharePoint page, and plans to meet in-person as a group at least once monthly. James Lapczynski has agreed to serve as the Team Oh1o project lead, while Shaun Walz and Benjamin Christensen will take the lead on drafting the proposal/final paper and preparing the PowerPoint presentation, respectively. With the final paper due prior to Tier Three and a presentation scheduled for the final day of Tier Three – October 30, 2015 – the goal is to have everything completed by the end of September to allow for enough time to make final adjustments and prepare-and-practice a presentation. Tier Two will serve as a pivotal point in the capstone project timeline; when the majority of the research will have been performed and a final content layout of the paper is agreed upon.

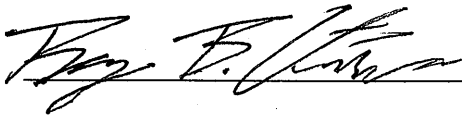
- March – Prepare/Submit a Capstone Project Proposal for Ohio Fiscal Academy approval.
- April thru July – Conduct interviews and perform research / Monthly Team Oh1o meetings.
- July – Prepare Case Study Paper outline by the end of Tier Two.
- August/September – Prepare/Finalize Case Study Paper (Lead: Shaun Walz).
- August/September – Monthly Team Oh1o meetings / Prepare/Finalize PowerPoint presentation (Lead: Benjamin Christensen).
- October – Presentation practice / Submit final Capstone Project Proposal.

The final deliverable of Team Oh1o's Oh1o Fiscal Home Page capstone project will not be a working website, but rather a detailed written recommendation of what should be included in a website, how it could function and be maintained, and why the need exists.

**Note: 'Oh1o' is intended to be translated as 'One Ohio'.*

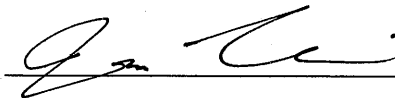
We, Team Oh1o, agree to the preceding Ohio Fiscal Academy Cohort 5 Capstone Project Proposal as confirmed by our signatures below:

Benjamin Christensen
Ohio Board of Regents



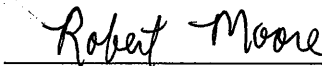
3/27/2015
Date

James Lapczynski
Ohio Department of Mental Health and Addiction Services




3/27/2015
Date

Robert Moore
Ohio Development Services Agency



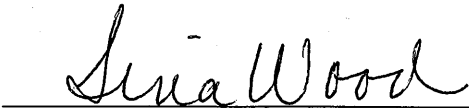
03/27/2015
Date

Shaun Walz
Ohio Development Services Agency



03/27/2015
Date

Tina Wood
Ohio Industrial Commission



03/27/2015
Date