



FTA Awards Nomination/Entry Form

Person who led this effort or project

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About your program, idea, or project

Name your program, idea, or project: Technology for Transparency: A Home Grown Solution

What is the problem that you wanted to solve?

The Michigan Department of Treasury’s Lean Innovation and Improvement Bureau was facing three concurrent challenges in 2023. First, with innovation and improvement projects on a meteoric rise, there was a clear need for increased structure and tracking of project requests and statuses. Second, recent employee engagement surveys across Treasury indicated that staff wanted more transparency in communication about what was happening around Treasury, and the “why” behind projects and process changes. Third, budget limitations constrained the capacity to procure a software solution for project management and reporting.

In response to these distinct challenges, Treasury leveraged the technological expertise of its existing staff to develop a sophisticated project management system with a reporting dashboard. This dashboard was made accessible to every Treasury employee. Treasury now actively and accurately tracks its robust project portfolio ensuring all employees are well informed about active projects and their statuses. All this functionality was achieved at no additional cost to Michigan, requiring only staff time.

Other Michigan agencies including the Department of Natural Resources, Licensing and Regulatory Affairs, the Department of Technology, Management and Budget, and the Michigan Department of Agriculture and Rural Development have already expressed interest in utilizing the format and functionality of this innovative tracker.

Who was involved in addressing the problem?

All project partners were internal to Treasury, displaying high motivation and close collaboration. The State of Michigan's Department of Treasury Lean Innovation and Improvement Bureau's Innovation Division originated and communicated the initial ideas to Treasury's IT Business Integration Division (ITBID). The Innovation Division collaborated closely with Treasury's ITBID to swiftly bring these concepts to life, achieving record timeframes.

How did they go about finding a solution?

Because all partners in this project were Treasury-internal, highly motivated, and closely collaborating, the implementation timeframe was amazingly fast for an IT project. The initial ideas were conceived and communicated from LIIB to ITBID in September 2023. By early January 2024, we had entered the testing phase, encountering very few issues. In February 2024, the system and reporting dashboard were live, with ongoing refinements being easily managed by ITBID, often within weeks if not days.

Currently, all department-wide projects including our annual call for projects and ad hoc requests are reflected and tracked in the system and reporting dashboard. The announcement to all Treasury staff of the availability of the reporting dashboard for viewing was posted to our Treasury website in April 2024. Additionally, during this period, senior staff, directors, and managers were informed about the availability and functionality of the reporting dashboard for dissemination.

Describe the outcome. What is the new idea, approach, program, or activity?

Our innovation revolves around the efficient management and reporting of projects within the Michigan Department of Treasury. While the concept of organizing projects into a management system is common, our approach of developing and implementing an internal system at no additional cost is truly innovative. This initiative was accomplished using already-budgeted wages, making it cost-effective, rewarding, and impactful. Our project management and reporting tool has not only improved project management within Treasury but has also enhanced employee engagement. Through our employee engagement survey, we identified a need for greater transparency and communication regarding higher-level initiatives and projects. In response, we made project data and key highlights accessible to all Treasury employees through the reporting dashboard. This real-time dashboard provides information on project status, assigned personnel, strategic priorities, and sponsoring leadership, fostering a culture of ownership, accountability, and transparency. Overall, our innovative approach to project management and employee engagement has not only benefited Treasury but also serves as a model for other state agencies striving for excellence in project tracking and management.

The reporting dashboard features Power BI capabilities that are accessible to all Treasury employees, offering several key features:

- Hovering capabilities for high-level details.
- Drill-down functionality for more specific information, such as linking IT projects to continuous improvement projects, identifying projects as Senior Leadership Priority projects tied to the strategic plan, and detailing the purpose of each project.
- Filtering options by business area, calendar year, project status (potential, assigned, closed, ongoing, etc.), and project type (organizational change management, continuous improvement, strategic planning, training, etc.).
- A Gantt chart displaying project volume scheduled throughout the year, showing project leads from our work area and the level of complexity.
- Historical data for articulating the return on investment (ROI) for the support provided, team productivity, and individual contributions.

These key features allow us to proactively manage our work and make data-driven decisions, ensuring the best outcomes and prioritization of projects for the organization.

What has changed since this was implemented? How have your operations improved? Include any data, analytics or metrics that would show the value of your program. Don't forget management advantages such as improved morale.

How it's Different: One of the key aspects of our innovation is the decision to open the reporting dashboard to all employees, allowing them to access project information at their discretion. This approach goes against the traditional practice of limiting such access, demonstrating our commitment to transparency around new initiatives and changes, and inclusivity to all levels of staff. Many state agencies often seek the perfect project-tracking system by investing in costly external solutions. However, this approach can be time-consuming, requiring extensive procurement processes, and ongoing vendor management. In contrast, our decision to leverage our internal expertise and resources proved to be highly effective. Working closely with our Information Technology Business Integration Division (ITBID), we collaborated to develop a system and reporting dashboard tailored to our specific needs. This collaboration not only resulted in a system that meets our project management requirements but also strengthened the partnership between Executive Operations, Treasury's Lean Innovation and Improvement Bureau (LIIB), and ITBID.

What was Better? How do we Know?

As of April 2024, the Department of Treasury manages 99 projects assigned various statuses within the new system, with 39 actively assigned to our Innovation Division within our Lean Innovation and Improvement Bureau. Prior to the implementation of the new system and dashboard, leadership within the Innovation Division had to manage, track, and report on this fluctuating volume monthly using multiple spreadsheets and data sets due to the lack of visibility for the true project sponsors/owners. The preparation time for monthly report outs to senior staff, which previously took 3-4 hours, has been virtually eliminated. This has led to increased accountability and tracking of business-area-owned projects. With the new dashboard and accesses granted, project

sponsors can now own their priorities and provide real-time updates throughout the year to our Treasurer.

A Treasury tool for evaluating the impact of transparency-promoting practices such as the dashboard and other Treasury efforts is regular employee surveying. Our engagement scores for the question, "When changes occur, leadership does a good job explaining the reason behind them (the 'why' and not just the 'what')," improved by 9% on our most recent employee engagement pulse survey. With a total staff count of 1,307, this increase is considered statistically significant. The institution and usage of the dashboard will continue to promote this transparency—this focus on answering the "why" for staff.

This impact aligns with our strategic plan commitment to continuous improvement, employee engagement, and customer service. As of April 24th, 2024, we successfully implemented phase 3 of the project, which introduced robust production data providing ROI and production insights for our Innovation Division. After implementing this phase, our innovative project management and reporting solution has emerged as the leading continuous improvement project management system in the State.

Is there any component of your program that makes it workable only in your state or city?

Another agency with a similar tax type or this kind of problem could adapt or adopt this idea.

Is this an in-house project, or did you partner with an outside vendor or service-provider?

100% in-house

Additional information or comments about your usage of outside vendors or service providers.

Key Stakeholder Feedback:

"The LIIB Dashboard has offered Treasury transparency and a proactive ownership realignment. Showcasing projects we prioritized to drive our strategic plan, follow-up work has been reduced and the Business Areas are back in the driver's seat. We anticipate a significant increase in timely priority project completion, and far fewer projects rolling over into the following year."

- Corey Grant, Chief Operations Officer,
Michigan Department of Treasury

"As leaders, we recognized the need for greater structure in our project management processes, greater transparency in our communications, and the importance of keeping a pulse on the outcomes of our priorities. This innovative approach not only enhances our project tracking capabilities but also demonstrates our commitment to accountability, transparency, inclusivity, and fiscal responsibility. This solution has been impactful on Treasury, and we are excited to continue optimizing it to further benefit our teams and the taxpayers we serve."

- Kavita Kale, Deputy Treasurer, Michigan
Department of Treasury

What comes next — will you be adding to your program, rolling it out more widely, trying additional approaches?

Future enhancements involve transitioning all 23 department-wide scorecards, comprising a total of 348 individual metrics, into our reporting dashboard by September 2024.

This transition is projected to result in cost savings of \$60,000 and will offer our internal stakeholders increased flexibility in how their metrics are displayed.

This transition will also significantly impact employee engagement by granting all Treasury employees access to key metrics currently tracked and closely monitored for the Agency. Previously, these metrics were accessible only through an external vendor-hosted program that required licenses, of which we had only 25 due to cost constraints.

Additional Optional Materials

Documentation Upload



FTA Award Submission.pdf