



ctcLink Project Quality Assurance
Monthly Report – November 2018

Presented to:



**Washington State Board for
Community and Technical Colleges**

By:



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Table of Contents

Cover Letter	3
Executive Summary.....	4
Project Status Scorecard	5
Project Integration Management	9
Project Scope Management	12
Project Time Management.....	17
Project Cost Management	19
Project Quality Management	20
Project Human Resource Management	22
Project Communications Management	23
Project Risk Management	24
Project Procurement Management	25
Project Stakeholder Management	27
Tracking / Reporting Assessment.....	28
Risk Assessment.....	29

Cover Letter

MTC is conducting regular quality assurance reviews of the Washington State Board for Community and Technical Colleges' ctcLink Initiative. The ctcLink project will provide the foundation for the next generation of services to students, faculty, and staff in an environment that enables them to self-manage their data and experiences. It will leverage and enhance the inherent efficiencies of the 34 college system through the implementation of a single, centrally provided system of online student and administrative functions. This report is intended to provide an independent, periodic assessment of the key components of the major project initiatives. This report is based on in-person and phone interviews with key project personnel and our review of documentation uploaded by the various teams to the SharePoint sites as well as any critical items that we may need to follow up on based on the previous assessments.

If you have any questions about the content of this report, please feel free to contact me at the email address or phone number provided below.

Sincerely,



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Executive Summary

The Quality Assurance (QA) Team believes the overall status of the project is YELLOW at this point. While QA is satisfied with the progress that the project as a whole is making, there remain a number of concerns that require better progress to improve the status ranking.

Training content and delivery is a key workstream for the project. The development of Training Course materials is significantly behind schedule. The Project Management Office (PMO) is taking appropriate actions to recover this schedule by reallocating resources and procuring external consulting support. A new Training Manager is currently analyzing and dissecting the scope and workload for development of the Training Materials. This analysis is expected to be completed in early December.

QA continues to be concerned that there is risk created by the number of solutions to be re-implemented to replace/augment current PeopleSoft functionality and that the timing and resource availability could negatively impact the current ctcLink Deployment Group 2 and future Deployment Group 3 scope/schedule. Software requirements and RFPs are being developed and once vendors are selected, there will be a better understanding of the technical and schedule impacts.

As discussed in previous reports, the extended timeline to complete Fiscal Year End Closes have been impacting work related to Deployment Group 2 (DG2) and future deployments. State Board and College Resources were assisting with year end closes and not able to focus on DG2 activities. As the closes were mostly done at the end of November, QA expects that resources will be able to focus on future deployments now.

The new ctcLink Administrative Security module which was targeted for delivery by a 3rd party consulting firm to the project remains delayed from the original contractor target date. The complexity of the administrative/business process roles varying at each college has made this design more challenging.

While QA has concerns on the above items, it should be noted that the project team continues to demonstrate significant progress in a number of areas, including the following items.

The implementation of the new standard Chart of Accounts adds risk and complexity to the DG2 Project. The Chart of Accounts (General Ledger) has been now configured. The ctcLink Finance Pillar team has presented this configuration structure to the Business Accounting and Reporting Council (BAR) and Business Affairs Commission (BAC) for appropriate vetting.

Organizational Change Management (OCM) is now actively engaged in multiple areas, all focused on getting DG2 and DG3 colleges ready for deployment. A pre-kickoff meeting for DG3 Colleges was held in November. Individual college kick-off meetings are scheduled for December and a DG3 all college kick-off is schedule for late January 2019.

Performance had been an issue during the 3rd quarter of 2018; however, SBCTC IT and their Managed Services provider (Burgundy Group) are closely monitoring system performance and taking responsive corrective actions to mitigate outages and impact to the FLC Colleges. The Amazon Web Services (AWS) Production system continues to report “0” unscheduled outages since September 8th. Common Process (CPW) Workshops undertaken by the College PMs and OCMs are considered a major OCM activity that merit continued support and recognition. Additional workshops were held in November. The priority CPWs should be completed by Spring 2019. Project functional staff continue to be engaged in supporting the CPW workshops.

Lastly, as another example of lessons learned, the PMO plans to increase the scope of parallel testing. Parallel testing prior to First Link Colleges (FLC) go-live was limited to payroll processing. The PMO is now deciding on additional areas for parallel testing, including student financial aid and Finance month end close.

Project Status Scorecard

At the request of the colleges, and with permissions from the State OCIO, we include an overall project status scorecard for stakeholders to identify project status and key issues.

The following table summarizes the assessment of each of the critical areas included in the QA review with primary focus on the Deployment Group 2 Project.

ctcLink Project Assessment Scorecard

<u>Project Area</u>	<u>Prior Status October 2018</u>	<u>Current Status November 2018</u>	<u>Overall Comments</u>
Overall	YELLOW	YELLOW	Deployment Group 2 (DG2) Scope/Schedule are currently considered YELLOW by the QA team.
SBCTC/ Governance	GREEN	GREEN	The Governance framework continues to work as expected. Governance is reviewing and approving the system-wide Common Business Processes derived from meeting with the colleges.
Project Management	GREEN	GREEN	<p>The PMO is fully staffed. PMO team members are continuing to address improvements in project management processes. QA views the ctcLink Project morale as very good at this time. PMO team is working well together.</p> <p>A Project Management (PM) summit was held in early November. Recognizing ongoing personnel changes, the PMO has also developed on-boarding materials for use with new project staff.</p>
Phase Scope	YELLOW	YELLOW	<p>QA continues to be concerned that there is risk created by the number of solutions to be re-implemented to replace/augment current PeopleSoft functionality and that the timing and resource availability could negatively impact the current ctcLink Deployment Group 2 and future Deployment Group 3 scope/schedule. Software requirements and RFPs are being developed and once vendors are selected, there will be a better understanding of the technical and schedule impacts.</p> <p>The RFP for a new 3rd party Continuing Education (replacement software) solution was released. Close date for vendor responses was in November. A Vendor Evaluation and Selection Team (VEST) decision and governance approvals are outstanding; therefore, analysis of the impact on the current project schedule/budget remains unknown.</p> <p>The new ctcLink Administrative Security module which was targeted for delivery by a 3rd party consulting firm to the project remains delayed from the original contractor target date. The complexity of the administrative/business process roles varying at each college has made this design more challenging. Latest information has this delivered by February/March.</p>
Schedule	YELLOW	YELLOW	Deployment Group 2 includes converting both

<p>Status</p>	<p style="background-color: yellow; text-align: center;">YELLOW</p>	<p style="background-color: yellow; text-align: center;">YELLOW</p>	<p>Tacoma and Spokane to the new Chart of Accounts (CoA) with an operational target date of July 2019. SBCTC will close the FY years for the FLC Colleges on November 30th. This is a mandated requirement to meet State Office of Financial Management (OFM) directives. FLC Colleges will still be able to process adjustments post close.</p> <p>QA is concerned that the implementation of the CoA for the FLC colleges is an Open Project Risk that could jeopardize the Deployment Group 2 schedule. There is a financial consequence to an FLC college if both are not converted to the new CoA. In order to meet the schedule, both FLC College finance teams must be fully engaged in preparing for the new Chart of Accounts implementation.</p> <p>With the Deployment Group 2 full Go-Live date now targeted for October 2019, the overlap of schedules and resource constraints now directly impact Deployment Group 3 (DG3) Colleges. PMO is working with DG3 Colleges to reduce the risks at this time. The DG3 Project Kickoff is now scheduled for January. Supporting both Deployment Groups requires schedule compression and complex allocations of key resources.</p> <p>PMO is routinely reporting project status. DG2 colleges are also “Self-Reporting” their status.</p>
<p>Training</p>	<p style="background-color: yellow; text-align: center;">YELLOW</p>	<p style="background-color: yellow; text-align: center;">YELLOW</p>	<p>Training content and delivery is a key workstream for the project. The development of Training Course materials is significantly behind schedule. The PMO is taking appropriate actions to recover this schedule by reallocating resources and procuring external consulting support. A new Training Manager is currently analyzing and dissecting the scope and workload for development of the Training Materials. This analysis is expected to be completed in early December.</p>
<p>Testing</p>	<p style="background-color: green; text-align: center;">GREEN</p>	<p style="background-color: yellow; text-align: center;">YELLOW</p>	<p>Future PeopleSoft updates/bundles and 3rd party software installation and support work is being managed outside of the Project responsibility. The DG2 Testing workstream is a concern since it relies heavily on the availability and expertise of functional project staff. For this reason and including the overlap between DG2 and DG3 phases, the QA team views Project Testing as a YELLOW status.</p> <p>Testing is acquiring an Automated Testing software product for use with PeopleSoft. It requires development of pre-built test cases, to test PeopleSoft software functionality, but also speeds up the rolling out latest product updates, maintenance and new feature packs and major upgrades. This has many benefits, but to get this properly setup requires considerable staff commitments. Testing team</p>

			expects to start the installation activity in January.
Configurations /Data Conversions	GREEN	GREEN	<p>The conversions and configurations workstream is a major component of the project schedule. System Configurations and Data Conversion Cycle 3 for DG2 is scheduled to start in early December.</p> <p>The implementation of the new standard Chart of Accounts adds risk and complexity to the DG2 Project. The Chart of Accounts (General Ledger) has been now configured. The ctcLink Finance Pillar team has presented this configuration structure to the Business Accounting and Reporting Council (BAR) and Business Affairs Commission (BAC) for appropriate vetting.</p> <p>FLC Colleges will be going live with the new standard CoA in production for FY19/20 prior to full Deployment Group 2 Go-live. FLC colleges will need to take ownership and control over their data management responsibilities.</p>
Organizational Change Management (OCM)	GREEN	GREEN	<p>OCM is now actively engaged in multiple areas, all focused on getting DG2 and DG3 colleges ready for deployment. A pre-kickoff meeting for DG3 Colleges was held in November. Kickoff is scheduled for January.</p> <p>Colleges are implementing a Peer-Review process for reviewing status of College deployment readiness. This is another OCM approach being implemented as a result of lessons learned from the FLC implementation and input from the Colleges PMs/OCMs.</p> <p>The Common Process (CPW) Workshops undertaken by the College PMs and OCMs are considered a major OCM activity that merit continued support and recognition. Additional workshops were held in November. The priority CPWs should be completed by Spring 2019. Project functional staff continue to be engaged in supporting the CPW workshops. This adds to their workload. Recommendations for implementing these CPWs are being channeled through the Governance structure for approval.</p>
Project Staffing	GREEN	GREEN	<p>Project has currently posted positions for 2 PeopleSoft Financials analysts, and a Student Financials analyst.</p> <p>PMO intends to use consultants/contractors to recover the schedule for development/delivery of Training materials.</p> <p>The ERP support team has posted a position for a Configurations/Environments Engineer and for two more ERP Support analysts.</p> <p>Overall ctcLink project staffing is okay at this time. All contractor positions are now filled. QA and the PMO remains concerned that the overlap of Deployment Groups 2 and 3 may require additional</p>

			resources.
Technical Environment	GREEN	GREEN	<p>The re-design of PeopleSoft security has fallen behind schedule. This impacts DG2/DG3 college overall readiness tasks. When delivered by the consultant firm, the software will still require testing and configuration work. Colleges will need to redefine their administrative role approval authorities for specific business process tasks for this security change to operate correctly with PeopleSoft.</p> <p>Future PeopleSoft updates/bundles and 3rd party software installation and support work is being managed outside of the project responsibility by the IT Division. Overall planning of these changes need to be tightly integrated with the ctcLink Deployment Group 2 and 3 schedules. This becomes more challenging with the overlap in schedules.</p> <p>The Deputy Executive Director/CIO continues addressing process improvements in technical operations. QA expects additional improvements to be implemented during the 4th quarter 2018 and extending into 2019. IT is currently working on improved communications processes between ERP support and FLC colleges.</p> <p>SBCTC IT and their Managed Services provider (Burgundy Group) are closely monitoring system performance and taking responsive corrective actions to mitigate outages and impact to the FLC Colleges.</p> <p>The AWS Production system continues to report “0” unscheduled outages since September 8th.</p>

LEGEND	GREEN	YELLOW	RED
Risk Description	1) Low risks may be encountered NO immediate action needed	2) Moderate risks may be encountered Serious deficiency and action item recommended	3) High risks may be encountered Needs to be escalated and can impact project effort or cost

Project Integration Management

Over the life of the project, are effective project management processes being used and coordinated within the project and with all project participants to achieve desired results?

Findings:

- Project Overall Governance
 - All three levels of Governance are now actively engaged within the ctcLink Project.
 - Presentations and minutes of all of the governance committee meetings are available.
 - Governance tiers are all working well.
 - SBCTC Executive and Project Leadership met with State Senate Energy, Environment, and Technology Committee on November 15, 2018. The scope and status of the ctcLink Project was presented at this time.
- PMO Organization
 - Project Management
 - The SBCTC PMO is fully staffed. This is consistent with past QA recommendations.
 - The PMO continues to make staffing adjustments as required. The Training team has a new Training Manager reporting to the PMO.
 - The Integrated Work Plan (IWP) work plan continues to be refined by the PMO. PM is closely monitoring the task status on a weekly basis.
 - The PMO is cross-integrating all components of the Project Management processes (Scope management, risk management, OCM tasks, UAT testing, Technical and Functional work streams, schedules, internal QA, and reporting) to better deliver the ctcLink deployments. QA views this as a really positive effort at this time.
 - Fiscal Year End Closes for CCS and TCC
 - There is a documented requirement from the State Office of Financial Management (OFM) that YE closes are due at the end of December 2018.
 - Effective November 30th, SBCTC will officially close FY 16/17 and 18 for both TCC and CCS and report their financial data to OFM.
 - TCC and CCS will still be able to post-close process financial adjustments to prior years.
 - College Deployments/Coordination
 - PMO and College PMs/OCMs are now implementing a Peer-Review process for reviewing deliverables and status of College Readiness activities as part of the internal quality review - Gate 1.
 - Oracle will no longer support the current deployed version of PeopleSoft Campus Solutions 9.0 as of December 2019. This means that vendor maintenance and compliance updates will no longer be available for ctcLink. FLC Colleges must have implemented the latest version of Campus Solutions 9.2 within the target timeline for Deployment Group 2 to continue to receive maintenance and compliance updates from the vendor and run financial aid and other compliance processing.

- The PMO has reassigned staff responsibilities for working with Colleges in preparations for their deployments. In November, the former Training manager transitioned to a College Relations role for the PMO.
 - Pre-kickoff meeting was held for DG3 Colleges. Kickoff meeting for DG3 is scheduled for January.
 - The PMO is now also engaged with supporting a full range of Deployment Group 3 activities. This next phase overlaps with Deployment Group 2 and will challenge resources and schedules. Deployment Group 3 colleges continue pre-deployment work. PMO is now tracking and reporting progress of DG3 Gate 1 Initiation Phase preparations.
- Project Schedule
 - The scope of Deployment Group 2 includes implementing the new standard Chart of Accounts (CoA) in July 2019 production for the FLC Colleges and deploying the full-system on an October 2019 Go-live date. Project impacts include changes to staffing, schedule, and budget. It will create overlap of key workstreams between Deployment Group 2 and 3.
 - The PMO plans to increase the scope of parallel testing. Parallel testing prior to FLC Go-live was limited to payroll processing. The PMO is now considering additional areas for parallel testing, including student financial aid and month end close.
 - QA areas of current concern for the DG2 schedule are:
 - Scope and Readiness of Training Materials
 - Scope of ctcLink Testing as it requires Project Functional staff expertise and availability.
 - Levels of FLC Finance management engagements in order to meet implementation date for the new Chart of Accounts.
 - Conversion data vetting by DG2 colleges and SBCTC.
 - Changes in current DG2 scope due to potential Governance decisions made regarding timelines for new replacement software products includes: Continuing Education software, Online Admissions, and Budget Planning solution.
- Status Reporting
 - SBCTC is continuing to provide the State OCIO, cELC, and Project Steering Committee with project status updates.
 - The PMO is using a project status report framework which addresses previous concerns of the State OCIO and of the QA team. It is being used to update status with the ctcLink Executive Leadership Committee and with the Project Steering Committee.
 - This report also includes a section on the Status of Open Remediation work carried over to the current Deployment phase. As recommended by QA, the PMO now supplements the summary status reporting with a more itemized status of each Open Remediation ticket.
 - As of November, the Remediation Activity for CCS remains RED.
 - AFRS CEMLI is not completed. The team has requested a separate testing environment for its solution.
- Project Staffing

- SBCTC PMO is routinely reporting on the status of staffing to Governance and State OCIO.
- Open positions for Project Training staff are now filled.
- Open Project Positions include 2 Financials Analysts and 1 Student Financials Analyst. These positions are now posted.
- PMO will need to bring on consultants/contractors to recover critical schedule for developing Training course materials.

Recommendations:

- **QA 0143** During the FLC Phase Project, the status of CEMLI delivery and testing was problematic. Many of these CEMLI's were not delivered until 2 weeks before Go-live, were not tested, and resulted in many operational errors. QA team recommends that a list of all CEMLI's be made available for review and maintained, indicating the pillar and business process related to the CEMLI, the latest status of testing, and any issues that will impact software readiness. This list should be made the responsibility of the Pillar PM with periodic reviews with the Technical Lead responsible for CEMLI's. QA team would like to review this list monthly. **QA Update:** CEMLI Master List is not complete/available for QA review. Currently a work-in-progress. **SBCTC Update:** All retrofit work has been complete by development from compare reports. The developers need to now go back and align the updated objects to the CEMLI and CEMLI design. These FDD/TDD's are important to be update for the transition to the support organization.
- **QA 0144** The current status of the Training Materials is a major area of QA concern. There are approximately 60 Courses to be developed for use with DG2 and DG3. QA recommends that a list of all planned Training Courses be made available for review and maintained, including the status of course components including Quick Reference Guides (QRGs), Step-wise Tutorials/Instructions, On-Line References materials linked to Business Processes, and Videos. QA team would like to review this list monthly. **QA Update:** New Training Manager is reviewing scope and dissecting planned content for the DG2 Training to be delivered. Scope and detailed schedule for delivery of training content is not available. Currently a work-in-progress.
- **NEW QA 0147** The current status of Testing UAT Framework and schedule is another major area of QA concern. The concept for UAT addresses lessons learned with FLC implementation. It incorporates on-line training components for use by college staffs involved with UAT tasks. QA views this very positive; however delivery of the training materials now is linked to this Testing Framework. QA team would like to review the detailed schedule for UAT activities and planned Project staffing workload to support the enhanced training scope.

Project Scope Management

Does the project include an approach to managing scope to ensure the project success?

Findings:

- The overall scope of the ctcLink Project involves Business Process Transformation. This is a key dimensional factor that scales the project relative any other project aspect. Since the beginning of the ctcLink Project, the QA team has continued to emphasize that this project is predicated on successful implementation of changes in community college business processes and not simply implementing a new software solution.
- The implementation of a new standard Chart of Accounts (CoA) is a significant change to the ctcLink Project.
 - The QA concern and the specific project risk involve meeting an aggressive timeframe from task initiation to completion. The fact that the Fiscal Year End Closes were extremely problematic after FLC go-live 3 years ago is raising QA concern for the DG2 scope and schedule.
 - The ctcLink and SBCTC Finance are involving the appropriate Commissions and Councils into the CoA redesign process to ensure all areas of configuration, processing and reporting are analyzed and vetted. QA views involvement of Commissions and Councils as a valued element of overall ERP Organizational Change Management.
- WACTC colleges are now working on implementing the “Guided Pathways model.” There are 3rd party application software products that are being used to support this model. Integration with the ERP PeopleSoft software needs to be considered and will most likely impact project scope. Any major changes to college academic structures will have a very big impact to ctcLink.
- The Common Process Workshops have been instrumental in bringing forward systematic understanding and adoption of global business processes. To date, over 30 Workshops have been held and recommendations continue to be taken to the Governance for approval.
 - The Common Process (CPW) Workshops undertaken by the College PMs and OCMs are considered a major OCM activity that merits continued support and recognition. Additional Workshops were held in November. Others are being planned and scheduled. Priority CPWs should be completed by Spring 2019.
 - ctcLink Project functional staff and PMO OCM are supporting these workshops with materials and application consulting.
- OCM/Training
 - Knowledge transfer involves OCM and effective delivery of Training is considered the most important factor for the successful operation of these business processes at a college.
 - Lessons Learned from the FLC Implementation have been a basis for a variety of OCM activities undertaken by the ctcLink team and PMO.
 - Training is being provided to the colleges for cross-walking data and data conversion validations.
 - The OCM based approach being developed for User Acceptance Testing is far more extensive in terms of training, instructions, and reference materials. The QA team believes this is a significant improvement when it is completed and is used by the colleges.

- The plans for ctcLink Training have now been revised and are considered by QA to be far more comprehensive as an effective educational framework. The overall concept being modeled for delivery of User Training has been changed to be focused on development of Open/Online/Ongoing Training courses that address the need to provide college administrative staff with continuing and available PeopleSoft functional education. It will be specific to business processes and incorporate Common Business Process elements.
- The new concept is intended to address the reality of colleges' training needs, including training for new staff, refresher training, and transition training for those moving into new or different roles. This challenge has been experienced with the FLC Colleges. Train-the Trainer does not work well given other factors.
- Planned ctcLink Courses will be scheduled like any modern college course, have instructor lead components, rely heavily on online content, require homework activities, be self-paced, and involve student assessments. It is current QA understanding that Courses will be offered to all Deployment Group staffs with priority for those already deployed and those participating in the implementation cycle.
- As currently planned, a limited number of Pilot courses are being developed. Total scope is estimated at over 60 courses. Three of these Pilot courses are being finalized by the team and are expected to be presented to college training leads for initial review/feedback.
- The QA concern is that the right level of targeted training scope is developed/delivered for the desired outcome. The Training Manager is currently dissecting the scope of the training and materials needed to support and will be meeting in early December with ctcLink Functional staff management to assess need and level of their involvement in content review/vetting/editing/delivery.
- Testing
 - The approach to ensuring business processes are successfully end-to-end tested, implemented, and operational has not been closely followed prior to this Deployment phase. The activity of User Acceptance Testing (UAT) testing is an important shared responsibility of the Project team and the Deployment Group colleges. It is another opportunity for the Deployment Group college administrative staffs to understand better how the PeopleSoft application software works with hands-on testing with their data. Reliance on others to perform the UAT is no longer an option to colleges. Project Testing will need commitment of college participation to perform more rigorous testing of business processes in this phase and future implementations. The QA team will be assessing and reporting on the participation level of the Deployment Group colleges during UAT as reported by the ctcLink PMO.
- Configurations/Data Conversions
 - Problems with FLC YE Closes highlighted the critical issues with previous data conversions. This is now evaluated as a higher risk area for future deployments to ensure the data mapping and results are properly reviewed and vetted by the colleges prior to implementation. Specific to financial transaction data, it requires the colleges to be fully understanding of their financial data and specific changes that are driven by the new Standard Chart of Accounts structure.
 - Currently, Conversion Cycle 3 is scheduled to start in early December.

- The ctcLink Project Technical team is interested in procuring STAT, an ERP Change Management Software product for use with Oracle/PeopleSoft ERPs. It enables the securing of code changes and migrations, applying/updating configurations, and enforcing rules when moving application software between system environments. QA team views this as a positive activity with long-term benefits.
- Security Improvement
 - SBCTC IT and the ctcLink Project have undertaken the re-design of the security approach used by the PeopleSoft application software. This redesign will enable the deployed colleges to assign their levels of administrative staff the roles for approving specific business process steps. This work relies on the expertise of a consulting firm experienced with PeopleSoft/Oracle. It addresses the differences that exist within each WACTC college for staffing their internal positions and assigning approval authorities.
 - This work was expected to be completed by the end of October for initial college reviews and feedback. It is now forecast to be available in early 2019. It will still need testing and college changes to their role/administrative approval authorities. Decisions on deployment timing will need to be made.
 - FLC colleges will have an opportunity to adopt the new security roles and controls in advance of DG2 go-live.
- Other In-Scope Items
 - **Continuing Education Solution/Software Product** - The RFP was published and closed in November. A Vendor Evaluation and Selection team (VEST) will be reviewing vendor proposals. This software would be a replacement to the current ctcLink solution provided by Ciber. It is expected that the evaluation will be completed by January. Any procurement decision will need to go to Governance for approval.
 - **Physical Inventory Software Product** - This product scope is planned to be in-scope for Deployment Group 2. Vendor solutions status is delayed to evaluate new functionality within PeopleSoft.
 - **Online Admissions** - A subcommittee finalized the QAA requirements. Project team reviewed requirements and Fit/Gap against ctcLink PeopleSoft functionality. The subcommittee is reviewing OAA options throughout US based Universities and Colleges provided by Oracle. They are currently scoring each solution and identifying the top 3-5 solutions to identify if they are a vendor or custom solution. The recommendation from this subcommittee will be presented to the ctcLink Governance for approval.
 - **Planning and Budgeting Tool** - The Hyperion product has been de-scoped from ctcLink. The BAC has recommended a replacement tool due to process and data complexity, maintenance and college costs. A replacement solution (Oracle PBCS) is being investigated by SBCTC with Oracle. No actionable work scope at this time, due to resource constraints for FY activities. Committee to be formed to review, finalize, and approve Budgeting requirements beginning early 2019.
 - **Dashboards and Analytics /OBIA** - The FLC implementation was not configured for SBCTC requirements. The new hires for SBCTC-IT and the ctcLink project staff have expertise to implement this solution for dashboards and analytics. This work is currently funded in the ctcLink budget. Additional resource support may be necessary. It is QA understanding this product scope may be implemented within or outside of a deployment.

- **Guided Pathways** – The Steering Committee approved an approach for gathering business requirements. The approach will utilize expert facilitators to lead the requirements gathering workshops for Guided Pathways.
- **Information Broker** – A pilot approach for using Information Broker (IB) is being developed by ctcLink technical team. The scope of the pilot involves extracting data directly from PeopleSoft using the IB tool.
- Remediation Remaining Work
 - The Integrated Work Plan has remediation items identified as tasks. The PMO has reviewed the status of these Open items and verifying if these are still valid or not reported as closed. It is easy to lose sight of the Remediation fixes at the same time that the Project team is focusing on other priority work. The number of Open tickets has been reduced based on latest PMO review. Remediation status is now included in the Project Status Report. The PMO now has prepared a report indicating the individual status of each Open Remediation tickets by PeopleSoft pillar and planned /adjusted dates for closing the tickets. Remediation scope also includes the Budgeting Planning Solution, the Online Admissions Solution, and the Continuing Education Solution.
- Legislative mandated changes to SBCTC and WACTC processes.
 - Each State legislative session produces new policies and may derive new requirements and modifications to existing processes that require updates to the legacy systems and also potentially to the PeopleSoft ERP CEMLI and reports. These need to be identified by ERP Support and tracked by the PMO.

Recommendations:

- **QA 0006** The approach for determining college readiness based on training needs to include more than just attendance in training sessions. It needs to determine if an employee meets qualifications standards to support the new PeopleSoft software as it applies to the specific business process operation. This assessment of FLC staff capability needs to be addressed as part of the Remediation Project. **SBCTC Action in Progress** - Outcomes and assessments have been identified in the updated Training Strategy as part of the ctcLink re-planning activities. They are currently being developed to support remediation work. These will also be leveraged in future trainings. Outcomes have been developed for the Remediation Project training courses as well as objective and performance assessments. Results from these assessments have been recorded in the Canvas learning management system. This approach will be utilized in future implementations. Additionally, a proposed evaluation process (Kirkpatrick level 3) is being developed by the Communities of Practice coordinator to assess college staff ability to apply training processes back in their work environment. **QA Response to SBCTC Action** – While we recognize and appreciate the work that has been completed, we will continue to note this recommendation until we see implementation of and results from the efforts of the team. We expect positive results will come about from the project team’s efforts, but we are not ready to consider the recommendation as acted upon just yet.
- **QA 0107** SBCTC Training and Testing teams need to work with the ERP Functional analysts to fully document the Year-end and Month-end Close processes while it is currently happening before this knowledge is lost. All colleges will benefit from capturing this critical business process information at a detail level. **SBCTC Action in Progress** - The ctcLink project team and ERP support team are jointly working with the pilot colleges to close out fiscal years 1516 and 1617. As part of the conditions for remediation sign-off, a working session is planned with the colleges to walk through the detailed steps and checklists for month end and year end

processing. These deliverables will be utilized in the deployment of future colleges. **QA Response** – As of October 2018, work continues with the FLC on FYE closes. **SBCTC Update:** Team working on Fiscal Year End as part of the closing activities and following FLC's close will have developed check lists, templates and best practices for monthly close and reconciliation as well as Year End close and reconciliation. This will not be completed until after FY16 and FY17 is closed. **QA Response** – We will want to review this documentation. Now that FYE closes will be complete on November 30, QA would expect the documentation work to be completed.

- **QA 0146** The current delay in completing the new security framework for the ctcLink could benefit from the colleges completing a work effort in parallel to completion of the security framework. One approach could be to use a spreadsheet to collect information regarding business process/tasks, approval authorizations, and assign organizational roles. **SBCTC Update:** The security redesign is currently underway and is scheduled to be completed on time in order to utilize it in UAT. **QA Response:** QA is considering this closed based on current status and potential impact to the project at this time.

Project Time Management

Is the project effectively managing the timely completion of the project?

Findings:

- ctcLink team and Colleges within Deployment Group 2 are now working on a schedule that has Go-live targeted for October 2019. Deployment Group 3 implementation is now planned to kick-off in January. The overall schedule for full 34 college system-wide implementation of ctcLink remains within the timeline included in the Amended Investment Plan and as approved by the State OCIO/TSB.
- The use of SBCTC and Project resources to assist with fiscal year-end close priorities were still engaged in November.
 - SBCTC Finance will close FLC FYEs on November 30th in order to comply with OFM.
 - OFM requires the FYE final statements by December 2018.
- The PMO is fully staffed. This expansion of the PMO is consistent with prior QA recommendations. Some staff adjustments were made in November to meet current priorities including change in assigned Training Manager and College Relations Manager.
- The Integrated Work Plan (IWP) for this phase has multiple workstreams being overall managed by members of the PMO. Meeting dates is important to re-establish project credibility. QA is concerned about Training and Testing areas- both are being classified as Yellow at this time.
- PMO has now implemented Project Status reports to be used on a bi-weekly basis with implementation of the new Governance model. The content of the Status Reports continues to be evolving with more data categories summarized and reported on. The latest Status Report includes:
 - risks and issues
 - status of milestones
 - status of the 3 system pillars (Finance, HCM, and Campus Solutions)
 - status of major workstreams
 - status information of College Pre-deployment activities
 - status of other project activities/solutions
 - status of Remediation efforts
 - Self-reporting on DG2 and DG2 activities by the colleges
 - status of QA follow-up recommendation
 - status of OCIO plan conditions
- The QA team remains concerned that there are key aspects of this project phase outside of the direct control of the SBCTC ctcLink Project Director and PMO. These include:
 - Deployment Group 2 active participation reviewing college owned configurations and data, college staff training, college participation in User Acceptance Testing, and OCM readiness aspects.
 - The RFP process and procurement of new software products to be integrated with PeopleSoft as requested by WACTC Commissions. The in-scope items may alter the implementation schedule, resource commitments, and schedule.
 - The release of PeopleSoft updates, bundles, and environment changes need to be better integrated with the Deployment Group 2 (DG2) schedule. As previously recommended

by QA, SBCTC IT needs to consider using industry standard Release Management processes to ensure that changes are closely integrated and supported with Projects.

- IT ERP Support will be hiring a Configurations/Environments Engineer to facilitate work related to updating and maintaining PeopleSoft production and Projects environments. QA is in agreement that this position is needed.

Recommendations:

- **QA 0132** AFRS CEMLI Status is a long standing QA concern. During the Remediation Project, due to resource constraints, this work was put on-hold. Reporting to State OFM has now resurfaced and the ctcLink Project team needs to get this work completed and operational to meet SBCTC reporting requirements to the State OFM. **QA Update-** The AFRS CEMLI remains an Open item. SBCTC ERP Support and ctcLink project resources are continuing to work through testing of the CEMLI.
- **QA 0145** The schedule for development of Training Course materials required for DG2 has now become YELLOW and probably will be approaching RED until the PMO has implemented a series of corrective actions and are recovering it. There are 60 courses to be developed. The pilot course was to be completed in September and is still not completed. QA recommends that the PMO expedite bringing on qualified contractors/consultants to recover the schedule. **QA Update:** PMO changed management of the Training workstream in November. This new Training Manager is analyzing and dissecting the scope of the Training Materials requirement and what is needed for the delivery of end-user training. QA considers that not all training courses require video. Training needs to be focused on the most critical of the 400+ business processes used by the WACTC colleges.

Project Cost Management

Is the project routinely estimating, budgeting, managing and controlling costs so that the project can successfully complete?

Findings:

- Current project budget and overall project cost information is currently closely managed by SBCTC Executive Management. The ctcLink Project Director has oversight of all spending on ctcLink. She does not have any direct spending authority regardless of amount. The project has mitigated this by adding the ctcLink Project Director in all review processes with the exception of staff reporting to IT managers.
- The ctcLink Project and Phase Budget information is now reported to State OCIO and Project Steering Committee on a monthly basis. The ctcLink Executive Leadership Committee also receives this information.
- The Project Budget status was reported to the State Senate Committee for Oversight of Energy, Environment, and Technology in mid-November.
- ctcLink project is using a formal time sheet reporting process for contractors. They require contractors to complete timesheets weekly that are compared to the invoices from the vendors by the ctcLink Human Resource Management and Procurement PM.
- The reset of the timeline for implementing Deployment Group 2 required a reassessment of staffing, timeline and budget for this phase of the project. The PMO has now extended key contractors to meet the new Go-live schedule of October 2019.
- The overlap of DG2 and DG3 required an assessment of project impact on cost of consultant resources. The budget impact was discussed with the Project Steering Committee and they agreed to extend contractors to mitigate risk of overlapping deployments.
- SBCTC and ctcLink Project teams are looking to procure automation software tools for efficiency and quality improvements. These costs will need to be processed through the governance processes.
 - The IT Testing team has acquired a software testing product for PeopleSoft ERP. Product is planned to be installed in January 2019.
- Costs for contractors/consultants to recover the schedule for development/packaging of Training materials for the 60 courses is not identified at this time. Project budget should cover these costs at this time.
- QA review of the reported Budget status (November 9, 2018) indicates that the ctcLink Deployment Group #2 currently remains within the established budget. Overall Project Budget is currently tracking under budget.

Recommendations:

- None at this time.

Project Quality Management

Is the project defining quality measures and using continuously improving processes to achieve project outcomes?

Findings:

- The PMO and Project Team has added staff and implemented improvements in processes. Many of the quality processes are related to college activities, communications, training, and OCM.
 - As recommended by QA, the ctcLink Project Director has assigned a Project Manager from the PMO responsible for internal project quality management.
 - SBCTC and Project process improvements have been previously reported on by the QA team. QA team expects more improvements now that the PMO is fully staffed. There have been a number of improvements with the additional staffing, including risk management, OCM, status reporting, and integration of training content development with project scheduled workstreams.
 - The PMO has further improved its processes by integrating risk management, OCM, scheduling, internal QA, training, and reporting processes. QA views this as very positive level of teamwork among the PMO staff.
 - A Project Risk and Issues SharePoint web application was implemented by the PMO in October and is now in use. It includes a workflow component that includes an assignment of project risks and issues to individuals to mitigate or resolve. The PMO is including High level Risks and Major Issues which are being highlighted in the overall ctcLink Project Status Report.
 - The Testing Manager now prepares a Weekly Status report and works closely with the PMO to integrate Testing tasks with other ctcLink activities. The new UAT framework is a prime example of the ongoing teamwork between Testing and the ctcLink PMO.
 - Many of the OCM improvements have been derived from lessons learned and include the new UAT framework and the new approach for delivering more effective business process end-user training.
 - The Common Processes Workshops (CPW) continue to play a key role in knowledge transfer and system-wide standardization of major business processes supported by the PeopleSoft application software capabilities. Additional CPWs were held in November and additional ones are being planned. This work continues with high participation of the colleges and staffs.
 - The outcome of these targeted CPW improvements should result in WACTC Colleges better equipped to implement PeopleSoft and operate their business processes successfully.
 - ctcLink Training reports to the ctcLink Project Director. The new plans for delivering comprehensive PeopleSoft education and business process training should result in improved quality outcomes for the colleges. QA concurs with the concept to be developed for revised training. The effectiveness of these changes will need to be monitored by the PMO and QA.
 - The PMO facilitated the Deployment Group 3 PMs in a Peer-Review Process for assessing completeness and quality of the pre-kick-off deliverables. ctcLink PMO is assisting with this QA process.

- The PMO OCM Manager has been assigned responsibility for ongoing assessment and reporting on College Readiness for Deployment Go-live.

Recommendations:

- **QA 0131** The QA team recommends that the PMO list all process improvements targeted for this phase and measure/report quarterly on the effectiveness of these improvements. This should be function of the Project Manager assigned to the internal project quality management activity. **QA Update-** This is still an Open recommendation. The PM for Internal Quality Management is currently preparing a report showing FLC Lessons Learned, Specific Process Improvements, current Project status. QA expects to review this report in December.

Project Human Resource Management

Is the project acquiring, developing and managing appropriately skilled and adequately staffed project teams?

Findings:

- Project Staffing:
 - The PMO continues to make adjustments in staffing and including use of consultants. This will be ongoing and is to be expected.
 - SBCTC PMO and ctcLink teams still have a number of Open Positions for Hire.
 - The open positions for Training staff (Content Development and Trainers) have been filled.
 - Currently have 2 positions posted for Finance Analysts, and 1 position for Student Financials Analyst.
 - PMO has reassigned technical lead responsibilities for data conversions, CEMLI, and upgrades.
 - PMO held a PM Summit in November.
 - Hiring the level of PeopleSoft/Oracle ERP expertise in Olympia has been and will continue to be an issue of “market” salaries. Hiring experienced staff for ERP support positions, which pays different salaries, is even more challenging to SBCTC. No technical or PeopleSoft training is planned at this time by the Project.
 - The SBCTC Test Manager has reassigned the role of Test Automation Engineer to focus on using current and future software tools to automate and streamline repetitive testing to reduce cost and timelines for testing ctcLink updates and changes.
- Deployed colleges will continue to be impacted by staff turnover based on external salaries/opportunities. Besides normal staff turnover, they also have the new challenge of keeping their staff once trained and working with PeopleSoft. As more colleges are deployed, key staff will be offered opportunities by other colleges once they have PeopleSoft ERP and HE experience.

Recommendations:

- **QA 0140** The concept for Training Delivery (August 2018) has major benefits for the ongoing education of college administrative staff in ctcLink business process and PeopleSoft functionality. QA would recommend that the revised scope of the training model be widely communicated to the stakeholders at this time given the positive expectations for the resulting outcomes. **SBCTC Update-** This recommendation is underway. Training is developing a prototype of the new approach and it will be evaluated once it is complete. Looking at overall content development scope and at external vendors to help build out the self-paced training. As ctcLink finalizes the approach, we will be working with the colleges for feedback. **QA Update-** New Training Manager is currently analyzing/dissecting what Training Materials will be needed for each of the 60 planned training courses and what the level of Functional Analysts are needed to meet the schedule. Functional Analysts (SMEs) are needed to review and edit functional content at a minimum.

Project Communications Management

Is the team identifying stakeholders and supporting timely, appropriate and accessible communications over the project's life?

Findings:

- The ctcLink Project site is undergoing improvements as identified by the PMO and the College PMs.
 - Documentation and materials used for scheduled meetings are now posted and available for review.
- The Communication Manager reports to the ctcLink Project Director.
 - One additional staff has been added to keep project communications up to date.
- The new 3-tier Governance model has significantly expanded the project communications work. Planning and scheduling for meetings, presentations, facilitations, minutes, follow-on actions, and decisions require support of Project communications staff.
- The content development of materials to support communications is being distributed within the ctcLink Project staff with the Communications team reviewing, finalizing, and prepping prior to intended use/audience.
- Communications scope also includes monthly Communications (Status Updates) to the State OCIO, TSB, and Legislature. It also includes responding to specific requests from the OCIO and Legislature for addition information.
- The Project Communications Plan continues to be updated. Since the scope of communications is enlarged with implementation of the new Governance model, it should be periodically reviewed to determine effectiveness vs. effort.
- The ctcLink Blog is now available for outward facing communications.
- Colleges are now submitting their Communications Plans to the PMO Communications Manager for review and feedback.
- The Project Web (PW) SharePoint site is being used to store/update/retrieve documentation including schedules, reports, OCM and PMO templates, risk/issue logs, communications, and other project documentation.
- An All-Hands meeting was held with the ctcLink Project teams November 15th.
- An On-boarding Reference was prepared in November for the Project. It utilizes MS SharePoint. QA views this as a positive improvement for providing needed information for new project team members.
- A presentation was provided to SBCTC Agency Liaisons to Commissions and Councils of November 10th. QA is concerned that this was not coordinated with the Project Communications Manager.

Recommendations:

- None at this time.

Project Risk Management

Is the project effectively identifying, analyzing, and controlling project risks and issues?

Findings:

- The closing of FLC financials for FY15-16 and FY16-17 has been categorized by the Governance as the top priority activity for SBCTC and the FLC Colleges.
 - SBCTC Project and Support staff continued in November to provide YE support services to the CCS.
 - As of November 30th, SBCTC Finance has closed FYEs for TCC and CCS.
 - The State OFM requires that these FYE Financials are reported by December 31st.
 - It is expected by SBCTC Finance that FLC colleges will still need to make financial adjustments past the FYE closes.
- The Project Status Report now includes a section that identifies project risks and mitigation actions being taken by the PMO. This report is now routinely available.
- DG2 Colleges and SBCTC are now self-reporting status and risks/issues. As of the November 9 Status Report, Clark, Tacoma, and SBCTC are each reporting status as GREEN, and CCS is continuing to self-report as RED.
- FLC Colleges and the Project Team are also now self-reporting status of Remediation work. Tacoma is reporting status as GREEN and CCS and the Project Team are both reporting RED.
- Continuing project risks are:
 - The Standard Chart of Accounts activity involved changes to Deployment Group 2 schedule. **QA Update:** The PMO and Deployment Group 2 Colleges provided the Project Steering with information and recommendations for implementing the CoA in order to minimize risk. The major issue is the timing for the Go-live date for the FLC Colleges is now July 2019 in production. Full Go-live for Deployment Group 2 is now reset for October 2019.
 - Good progress has been made with adding project staff. Key project staffing will continue to be a project risk, but risk at this time is reduced.
 - The ctcLink Project Director has now elevated the risk area of configurations/data conversions based on root causes of problems encountered during the Remediation project and FY closes for the FLC Colleges. DG2 Colleges and SBCTC will need to be focused on reviewing/vetting their data conversions.
 - Budget risk is directly related to staffing, scope, and schedule. QA has concerns that certain items (new software for in-scope items), and project funded staff assigned non-project work) are outside of the control of the ctcLink Project Director and will possibly impact budget, scope and timeline. At this time, the ctcLink Project Director does not forecast any overall increase in the OCIO approved Investment Plan budget based on scope and deployment plans.
 - Overlapping of schedule for DG2 and DG3 are competing for Project SME resources. It is possible that staff will be triple assigned to specific priority workstream tasks within limited timeframes and will need close monitoring/adjustments by the PMO.

Recommendations:

- None at this time.

Project Procurement Management

Is the project appropriately managing the acquisition of products, services or results needed from outside the project team? Is the project effectively managing the resulting contracts over the life of the contract?

Findings:

- SBCTC has been able to utilize the Supplemental Staffing agreements to add PeopleSoft consultants to the project.
 - A spreadsheet has been developed by the PMO and is being used to track contractor invoices against consultant hours.
- SBCTC is working with a sub-group to evaluate vendor proposals for a Physical Inventory (Asset Management) software product since this was considered in scope for the ctcLink Project. The evaluation of vendor solutions has been delayed.
 - As of October, new PeopleSoft Functionality is being evaluated to provide integration for asset tracking scanners directly with ctcLink.
- The Student Services Commission with SBCTC support is in process of identifying a 3rd party software product to replace the Continuing Education front-end component of the ctcLink system. The current ctcLink component is considered deficient by the colleges.
 - The RFP was published on October 15, 2018. Vendor proposals were due on November 15, 2018. Vendor questions were being answered by the end of November. A Vendor Evaluation and Selection Team (VEST) will be the next step in the SBCTC standard procurement process. Solution decision most likely in January timeframe. Impact to DG2 schedule is unknown at this time.
- Burgundy Group, the integration services firm, was contracted to move ctcLink technical environment to AWS and that work scope has been completed. Burgundy continues to provide on-going Managed Services support for the ctcLink project and production.
- SBCTC IT contracted with Spear/MC (a systems consulting firm) to re-design the PeopleSoft/Oracle security approach. This company currently has a consultant(s) working on-site with SBCTC and ctcLink to develop, test, and deliver the improvements in business process security. This activity has been more complicated given the WACTC college organizational differences. The completion of this work has been delayed. It is now forecast for February 2019. Matrix mapping of security roles is currently scheduled to begin in March. QA is concerned about the slippage in schedule and impact to the DG2 colleges.
- ctcLink Technical team is interested in procuring a specialized Software Product from Quest Software (STAT) to manage software migrations and that works with PeopleSoft/Oracle. The STAT product automates, secures, and streamlines the application change management process. QA believes this is a good product that will provide long term benefit to the project and post support.
- SBCTC Test team has acquired a license for a specialized software product from KASTECH. PETA is a tool that automates various tasks within the PeopleSoft Enterprise application – primarily functional testing. Automating functional testing allows execution of more rigorous tests with greater accuracy during a shorter time window. QA believes this is another worthwhile product that will provide long term benefit to the project and post support. This activity is moving forward at this time.

Recommendations:

- **QA 0142** QA recommends that SBCTC ensure that The Burgundy Group delivers a fully documented Technical Architecture of the ctcLink System as they have implemented it in the Amazon Web Services environment. ctcLink Technical and ERP Support staff require this documentation. This Technical Architecture documentation has been requested at this time. QA will continue to report on this Open item until it has been received, reviewed, and accepted. **QA Update-** SBCTC has received technical architecture documentation from Burgundy Group in October and has requested some additional information. **QA Update-** QA met with both ERP Support and the PMO Project Technical Manager. Both consider that they now have the technical documentation that they need. QA will now close the recommendation.

Project Stakeholder Management

Has the project identified key people, groups or organizations that could impact/be impacted by the project? Is the project using appropriate strategies to engage stakeholders on project decisions? Is governance, sponsorship and stakeholder engagement effective?

Findings:

- The ctcLink Governance framework is now operational at all levels. And it is working!
- Support for Fiscal Year-end closes for the FLC colleges continues to be an SBCTC priority for staffing and functional guidance. WACTC-Tech has also made this an extremely high priority. For the past year, SBCTC has had functional staff working with the FLC Colleges in support of this priority.
 - OFM has informed SBCTC and CCS that the Financial Reports must be completed by December 31, 2018.
 - To meet the above requirement, SBCTC Finance closed FYE Financials for TCC and CCS effective November 30th.
- The ctcLink Project status (progress vs. plan) continues to be reviewed with the State OCIO, TSB, and Legislature.
- The ctcLink Project status is also being routinely reported to the ctcLink Executive Leadership Committee (cELC) and Project Steering Committee.
- The recommendations for implementing the Standard Chart of Accounts during Deployment Group 2 were reviewed and approved by the Project Steering Committee. The options for FLC Colleges to implement the new CoA were reviewed with the FLC prior to the ctcLink Project establishing the July 2019 date.

Recommendations:

- None at this time.

Tracking / Reporting Assessment

An assessment of the accuracy of the project's tracking of progress toward milestones and budget estimates.

Findings:

- Microsoft Project is being used to plan and track the Deployment Group 2 work. It is also being used for planning and beginning tracking for Deployment Group 3.
- The PMO Project Manager with responsibility for Integrated Work Plan (IWP) project scheduling and reporting is now fully engaged.
- Pillar PMs are routinely reporting status. Status of major workstreams are also being reported.
- The status reporting of progress vs. baseline plan is still an Open item at this time. This reporting should be done against the specific workstreams. QA team expects this aspect will be corrected by the PMO. It will need to be stream-lined and now with the reset of the timeline, re-baselined.
 - Scheduling of training materials delivery has been problematic for the project. The PMO created a baseline/1 in August w/o integration of all training items at that time. An updated baseline/2 schedule was then planned include the integrated training workstream. Training materials workload basis is still being analyzed and dissected. Pilot courses were reported at 80-90% complete in September but are still not completed. The schedule for development and delivery of the 60 planned courses is now YELLOW. The PMO initiated corrective actions in November to begin to recover the schedule.
- The FLC colleges and the Project are self-reporting Remediation Status. As of November 9, 2018 published Project Status Report, CCS and the Project Team are self-reporting overall status as RED, TCC is self-reporting as GREEN. The reports list their Remediation progress and issues.

Recommendations:

- **QA 0134** The ctcLink Project Manager assigned from the PMO for internal project quality management and college readiness will need mentoring and an established framework to execute as it related to his role in internally tracking progress towards project milestones, quality metrics, and budget estimates.

Risk Assessment

Identify potential barriers to meeting project objectives and milestones, their probability of occurring and impact if they occur, and recommended and observed mitigations.

The Top Risks are:

- Implementation of a new Chart of Accounts with College active participation.
- Overlap of Deployment Group 2 with Deployment Group 3 workstreams.
- College participation in reviewing their data conversions for accuracy.
- Staffing constraints due to continuing ongoing support of FLC Colleges.
- Unknown scope impact of 3rd party Software solutions on DG2 schedule and resources.

The PMO is taking mitigation actions for each of these risks within its control.

The QA team has reviewed and agrees with the risks as identified by the ctcLink Project Director and included in the Project Status Report.