



ctcLink Project Quality Assurance
Monthly Report – December 2018

Presented to:



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

By:



1215 Hamilton Lane, Suite 200

Naperville, IL 60540

www.MoranTechnology.com

Voice & Fax: 877-212-6379

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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,



Charles R. Moran
Sr. Partner and CEO
Moran Technology Consulting, Inc.
Charlie.Moran@MoranTechnology.com
(877) 212-6379

Executive Summary

Overall project status for the ctcLink project is considered yellow at this time. While the project has made great strides in the past year, there is still much work to be done. QA does not consider any of the concerns it has to be serious enough currently to prevent future deployments, there are issues that need to be resolved in order to be successful. QA would consider these issues to be normal hurdles to be overcome in a project of this magnitude and is confident that the current management team can resolve them in a timely and acceptable manner.

QA is concerned about the progress being made in the training workstream. The revised scope and plans for ctcLink Training are considered by QA to be far more comprehensive as an effective educational framework. The PMO and new Training Manager are addressing this workstream; however, the activities related to this area are taking longer to coordinate than expected by QA. Contractors are being considered for content development of business process simulations and assessments. Costs for contractors/consultants to recover the schedule for development/packaging of Training materials for the 60 courses is not identified at this time. It is anticipated that project budget should cover these costs.

The implementation of the new standard Chart of Accounts (CoA) is a significant Governance approved change to the ctcLink Project. QA is concerned about 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, specifically as it relates to the implementation of the new CoA. 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. QA remains concerned that the 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.

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 software delivery is now February/March.

Project Status Scorecard

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 November 2018</u>	<u>Current Status December 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.
Project Management	GREEN	GREEN	The PMO is fully staffed and working well together. PMO team members are continuing to address improvements in project management processes.
Phase Scope	YELLOW	YELLOW	<p>QA remains concerned that the 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.</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 software delivery is now February/March.</p>
Schedule Status	YELLOW	YELLOW	<p>SBCTC closed the FY years for the FLC Colleges on November 30th. This was a mandated requirement to meet State Office of Financial Management (OFM) directives.</p> <p>The new CoA is scheduled to go into production in July 2019. 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. Supporting both Deployment Groups requires schedule compression and complex allocations of key resources.</p>
Training	YELLOW	RED	At this time, QA considers this Training workstream as RED. 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.

Testing	YELLOW	YELLOW	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.
Configurations /Data Conversions	GREEN	GREEN	System Configurations and Data Conversion Cycle 3 for DG2 has now started. The Chart of Accounts (standard General Ledger) has been now configured. FLC colleges will need to take ownership and control over their data management responsibilities.
Organizational Change Management (OCM)	GREEN	GREEN	OCM is now actively engaged in multiple areas, all focused on getting DG2 and DG3 colleges ready for deployment. Kickoff is scheduled for January.
Project Staffing	GREEN	GREEN	Overall ctcLink project staffing is okay at this time. PMO intends to use consultants/contractors to recover the schedule for development/delivery of online Training course materials. QA and the PMO remains concerned that the overlap of Deployment Groups 2 and 3 may require additional project and including contractor resources.
Technical Environment	GREEN	GREEN	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. The AWS Production system continues to report “0” unscheduled outages since early September.

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

Quality Assurance Findings

Governance

- SBCTC Executive Leadership Committee met on December 13, 2018 and the Steering Committee met on December 18, 2018. The scope and status of the ctcLink Project were presented and discussed during these meetings.

Scope

- Security Module
 - SBCTC IT and the ctcLink Project have undertaken the re-design of the security approach used by the PeopleSoft application software. This redesign enables deployed colleges to assign their levels of administrative staff the roles for approving specific business process steps. This work has relied 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 February/March timeframe.
 - The software will still need testing and college defined changes to their role/administrative approval authorities. FLC colleges will have an opportunity to adopt the new security roles and controls in advance of DG2 go-live. Decisions on deployment timing need to be made.
 - The project team will work with the colleges to help them develop their individual security setups.
- There are a number of other in-scope items which are outstanding and being closely watched by the QA Team, including:
 - **Continuing Education Solution/Software Product** - The RFP was published and closed in November. It is expected that the evaluation will be completed by January and presented 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** - 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.
 - **Planning and Budgeting Tool** - The Hyperion product has been de-scoped from ctcLink. Committee will be formed to review, finalize, and approve Budgeting requirements beginning early 2019.
 - **Dashboards and Analytics /OBIA** - 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.
 - **Guided Pathways** - The Steering Committee approved an approach for gathering business requirements.
 - **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.

Schedule

- The implementation of the new standard Chart of Accounts (CoA) is a significant Governance approved 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, specifically as it relates to the implementation of the new CoA.
 - 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.
- Kickoff meeting for DG3 is scheduled for January 2109.
- 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. DG3 implemented a 2 day Peer-Review Process to check status of the Pre-Initiation Work in order for colleges to proceed to the next phase gate.
- The Integrated Work Plan (IWP) for this DG2 has multiple workstreams being overall managed by members of the PMO. The ctcLink Planning/Scheduling Manager has reduced the number of tasks by rolling up certain areas to better control workflow and assigned activities. Scheduling is being resourced and tracked by teams, not specific individuals. Meeting dates is important to re-establish project credibility.
- As of December, the Remediation Activity for Community Colleges of Spokane (CCS) as self-reported remains RED. The project PMO is routinely reporting on status of remaining Remediation items. While QA understands the concern of CCS, QA is comfortable that remediation activity will be completed in a timely manner as agreed upon previously.
 - The Integrated Work Plan has remediation items identified as tasks. The PMO has reviewed the status of these Open items and has verified 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.
- AFRS CEMLI is not completed. It has been delayed due to the availability of the testing team. Now targeted to use January 2019 data for February 2019 testing. The Finance Support team will be documenting the use of the AFRS CEMLI by the end of January.

Training

- QA is concerned about the progress being made in the training workstream. The PMO and new Training Manager are addressing this workstream.
 - The revised scope and plans for ctcLink Training 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.

- 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. There are 60 planned courses within the scope for delivery of business process training. Some of these courses are new, covering special processes. Overall intent is to maximize creation of online content. These scheduling for content delivery of these courses is an Open item.
- Currently, the training team is redoing the PeopleSoft fundamentals courses for use with Global Design Adoption (GDA).
- Contractors are being considered for content development of business process simulations and assessments. 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. Initial meeting was held in December with contractors to discuss their capabilities to develop online training simulations and 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.

Testing

- QA is concerned about the progress of the Testing workstream.
 - SBCTC Test Manager is external to the Project and has other non-project responsibilities, including testing of the numerous updates/environments used for PeopleSoft production.
 - The Testing team has acquired the Automated Testing software that will be installed in January. This software will require implementing test scripts and involve ERP and Project functional staff.
 - 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.
 - Project Testing will need commitment of college participation to perform more rigorous testing of business processes in this phase and future implementations.
 - The planned UAT framework consists of: data scenarios and conditions, pre-requisite actions, supporting business process charts, error conditions.

Configurations/Data Conversions

- Problems with FLC YE Closes highlighted the critical issues with previous data conversions. This area is now evaluated as a higher risk for future deployments to ensure the data mapping and results are properly reviewed and vetted by the colleges prior to production implementation.
- Conversion Cycle 3 started in 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.

Recommendations

The following shows the open and recently closed recommendations with current updates from the QA and Project Teams.

- **QA 0006 Finding:** The lessons learned during implementation/post implementation of the FLC Colleges indicated that knowledge transfer requires an assessment of training effectiveness and the operational skills required by administrative staff specific to business processes.

Recommendation: 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 Finding:** The Month-end and Year-end close are key business processes that were not documented in sufficient detail. For the past 3 years, FLC colleges have struggled with these business processes and have relied on SBCTC Finance Support staff and Project personnel to assist them with operational aspects of these processes.

Recommendation: 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. **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 0131 Finding:** Since the implementation of the FLC Colleges and the Remediation project, there have been many process improvements by SBCTC and the ctcLink PMO that should be documented. Most of these were based on the lessons learned.

Recommendation: 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 activities. **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 early 2019.

- **QA 0132 Finding:** AFRS is the State Financial System. The PeopleSoft AFRS CEMLI will be used by SBCTC Finance to report College Financials in the format as required by the Office of Financial Management (OFM). The status of this CEMLI is a long standing QA concern. During the Remediation Project, due to project resource constraints, this work was put on-hold.

Recommendation: 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. Latest date is February 2019.

- **QA 0134 Finding:** The ctcLink PMO has filled a position for internal project quality management. The individual is new to this role and the PMO processes for internal quality assurance are being defined.

Recommendation: 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.

- **QA 0140 Finding:** The ctcLink PMO has reviewed FLC lessons learned for effective knowledge transfer given the complexities of educating and qualifying college administrative staff to properly perform business processes using the PeopleSoft software. The concept for Training Delivery (August 2018) has been revised and has major benefits for the ongoing education of college administrative staff in ctcLink business process and PeopleSoft functionality.

Recommendation: 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.

- **QA 0142 Finding:** The AWS architecture for hosting the ctcLink production and project environments is new. Previously this was hosted in CenturyLink data center with dedicated architecture. It is now hosted in the Cloud at AWS.

Recommendation: 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.

- **QA 0143 Finding:** 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.

Recommendation: 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 Finding:** 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. The development of course content is still not individually scheduled in the Integrated Work Plan (IWP).

Recommendation: 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, Simulations, Assessments and 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.

- **QA 0145 Finding:** The schedule for development of Training Course materials required for DG2 has now become RED. QA will keep this as 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. The new Training concept objective is to maximize online courses.

Recommendation: 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. Training needs to be focused on the most critical of the business processes used by the WACTC colleges.

- **QA 0146 Finding:** Based on lessons learned and feedback from WACTC colleges, SBCTC IT and the ctcLink Project recognized that the current security capabilities of the PeopleSoft software was not properly handling the complexities of multiple community colleges that are administratively staffed uniquely. A consultant was hired in 2018 to redesign the security for the ctcLink. This work was to have been completed by Fall 2018, however it has been delayed due to the complexities of the security model.

- **Recommendation:** 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.
- **QA 0147 Finding:** 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.
Recommendation: QA team would like to review the detailed schedule for UAT activities and planned Project staffing workload to support the enhanced training scope.

Project Management Book of Knowledge Assessment

Per the Washington State OCIO's Standard 132.30 Minimum Project Quality Assurance Activities, the project is assessed against the ten (10) Project Management Book of Knowledge (PMBOK) practice areas.

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?*

- All three levels of Project Governance are now actively engaged within the ctcLink Project.
- The Project Management Office (PMO) is fully staffed and closely monitoring task status of the Integrated Work Plan (IPW) on a weekly basis.

Project Scope Management - *Does the project include an approach to managing scope to ensure the project success?*

- Based on the implantation of the revised project governance and the establishment of a baselined project plan, QA believes the project team has developed an approach to managing scope that can lead to project success.

Project Time Management - *Is the project effectively managing the timely completion of the project?*

- The 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.

Project Cost Management - *Is the project routinely estimating, budgeting, managing and controlling costs so that the project can successfully complete?*

- 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.
- Currently, the project budget shows a surplus but this money is included in future, planned expenditures.

Project Quality Management - *Is the project defining quality measures and using continuously improving processes to achieve project outcomes?*

- As recommended by QA, the ctcLink Project Director has assigned a Project Manager from the PMO responsible for internal project quality management. The PMO and Project Team has added staff and implemented improvements in processes.

Project Human Resource Management - *Is the project acquiring, developing and managing appropriately skilled and adequately staffed project teams?*

- The PMO continues to make adjustments in staffing and including use of consultants. This will be ongoing and is to be expected.

Project Communications Management - *Is the team identifying stakeholders and supporting timely, appropriate and accessible communications over the project's life?*

- 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.

Project Risk Management - *Is the project effectively identifying, analyzing, and controlling project risks and issues?*

- 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 and discussed as part of Project Governance meetings.

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?*

- SBCTC has been able to utilize the Supplemental Staffing agreements to add PeopleSoft consultants to the project.
- The project has been able to identify and procure specialized skills required for certain deliverables, including the security framework and managed services.

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?*

- The ctcLink Governance framework is now operational at all levels. And it is working!
- 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.

Tracking/Reporting Assessment - *An assessment of the accuracy of the project's tracking of progress toward milestones and budget estimates.*

- The PMO Project Manager with responsibility for Integrated Work Plan (IWP) project scheduling and reporting is now fully engaged. Microsoft Project is being used to plan and track the DG2 and DG3 work. Pillar PMs are routinely reporting status.
- The status reporting of progress vs. baseline plan is still an Open item at this time. QA team expects this aspect will be corrected by the PMO as the training timeline is solidified.
- Tracking of status of training courses is concerning and needs to be addressed by the PMO.

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.
- 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.