City of Portland
Bureau of Technology Services

ITAP Project
Procurement and Acquisition Phase

Quality Assurance Management Plan

v1.0
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Prepared By:

CASE
Associates
Incorporated

Contract # 30002400
Task Order 1, DPO 22087275

Quality Assurance Management Plan

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INTRODUCTION

Purpose of the Quality Assurance Management Plan

CASE Associates Inc.'s (CAI's) Quality Assurance Management Plan (QAMP) defines the quality assurance processes, resources, and activities to assure the achievement of the ITAP Project's objectives during the Procurement and Acquisition Phase.

The QAMP's objective is to provide the City's Technology Oversight Committee (TOC), the Project Sponsor, the Project Managers, the Project Team, and designated staff with timely, independent, and objective reviews of the project's performance.

CASE Associates, inc. (CAI) will provide reliable, independent information to the project staff and stakeholders and to those charged with managing the project.

This QAMP defines how Quality Assurance (QA) will be conducted for the ITAP Project. This QAMP includes the following:

- The definitions of CAI, Development Contractor(s), Project Teams and Agency staff roles and responsibilities (as defined in the project plan(s) and the Task Order.
- The identification of all work tasks to be performed by CAI to provide confidence that the project will satisfy the specified and relevant process and product quality standards.
- The plan for QA Review, including scope, criteria, and methodology to be employed
- The plan for producing the required QA deliverables

Goals of the Quality Assurance Management Plan

The goals of the CASE Associates Inc.'s (CAI's) Quality Assurance Management Plan (QAMP) during the Procurement and Acquisition Phase of the ITAP Project are:

1. Provide proactive QA status and risk assessment services.
2. Identify and resolve RFP issues.
3. Identify and mitigate RFP risks.
4. Provide RFP review, assessments, and recommendations so that the ITAP Project will meet the business needs and achieve the desired outcomes.

ORGANIZATION

CAI Team

CAI's team consists of three consultants:

Name and Role	Comments
David Sharon Principal QA Consultant	Responsible for all CAI reports Usual CAI contact for ITAP Project team
Nell Klumph, PMP QA Consultant	Review Project Deliverables and Perform Analyses as assigned
Jamie Hanson QA Analyst	Proofread/copyedit QA Reports

CAI and ITAP Oversight

CAI's QA objective is to provide the City's Technology Oversight Committee (TOC), the Project Sponsor, the Project Managers, and Project Team, and designated staff with timely, independent, and objective reviews of the project's performance. To do so, CAI will work with the Project Manager to present findings and recommendations the various oversight groups involved in the project:

- The Project Sponsor
- The Project Steering Committee
- The Technology Oversight Committee

Contract Management

CAI will deliver the documents as specified in the contract. The ITAP Project Manager will also manage Contract 30002400 Task Order 1. As such, the PM will review deliverables and approve them for payment.

The CAI Principal QA Consultant and the ITAP Project Manager will review the deliverables jointly.

DELIVERABLES

Task Order Deliverables, Timelines, and Frequency

CAI and BDS agreed to a specific set of deliverables. Each is assigned a specific value expected timeline.

The deliverables are described in more detail in the Task Order. Those deliverables and expected timeline are expressed in the following table:

Deliverable	Frequency and/or Timeline
Quality Assurance Management Plan (QAMP) (this document)	One time Per the task order: "3 weeks after the selection of the QA consultant." However, CAI will deliver the QAMP to the Project Manager for first read on 3/23/12.
Initial Review and Assessment Includes: • Risk Management Assessment • Verification of Project Deliverables • Project Management Assessment • Verification of Product Deliverables (this will include verification only of vendor deliverable to date)	One Time Due 3 weeks after the City's acceptance of the QAMP. CAI will deliver an initial draft on 3/23/12.
Monthly Reviews and Reports Include: • Project status • Recommendations • Progress compared to established baselines The report will primarily be formatted from a template provided by TOC. It is a MS/Excel workbook with individual templates for each of four main evaluation areas: • Risk Management • Project Deliverables • Project Management • Product Deliverables	6 reports – March through August 2012 CAI and the Project Manager may select which months to deliver reports, and which months that will not have a report. Months without a report will likely be months where the Project Manager and CAI feel there is little change in the project's status. CAI will meet with the ITAP Project Manager monthly and attend the monthly TOC Meetings. For months when the report is to be created, it is due 10 business days prior to the monthly TOC meeting.
RFP Response and Contract Evaluation • Review and Assess the Vendor proposal evaluation process and the outcome before award announcement and identify any issues to be resolved • Review contract negotiation issues and offer recommendations	To be determined and assigned by the ITAP Project Manager

Quality Assurance Management Plan

Work Process

CAI will provide the following eight important quality assurance services:

1. Monitoring the application of the Project Management Methodology.
2. Assessing the key process areas, the degree of process compliance to TOC QA templates and metrics, project requirements, and the quality of the resulting end products.
3. Monitoring and assessing the relationship between Project Team and the contractors supporting and/or working on the project.
4. Assessing the completeness and appropriateness of the project and product deliverables.
5. Monitoring the project's performance according to the project plan and schedule.
6. Monitoring the quality of the work performed.
7. Managing the project risks that could affect the project’s scope, budget, and timely completion.
8. Proactively reviewing the project activities and suggesting process improvements.