City of Portland
Bureau of Technology Services

# SAN LCR Project

# Quality Assurance Management Plan

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**Prepared By:**

**CASE**
**Associates**
Incorporated

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Contract # 30002400

# 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 SAN LCR Project's objectives.

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 SAN LCR 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

### *Document Version*

| Version and Date | Author | Comments |
|---|---|---|
| V 1.0<br>3/23/12 | Clifford Smith | Initial version presented for review |
| V 1.1<br>3/25/12 | Clifford Smith | Add a section for inputs needed from the City to perform QA. |

# Organization

### *CAI Team*

CAI's team consists of three consultants:

| Name and Role | Comments |
|---|---|
| Clifford Smith<br>Project Lead QA Consultant | Responsible for all CAI reports<br>Usual CAI contact for SAN LCR Project team |
| Jamie Hanson<br>QA Analyst | Review deliverables<br>Assist the Project Lead in report development |
| David Sharon<br>CAI Principal | Signatory to contract 30002400 |

### *CAI and SAN LCR 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 to the various oversight groups involved in the project:

- The Project Sponsor
- The Project Steering Committee
- The Technology Oversight Committee
- The Project Oversight Committee
- The Infrastructure Board
- The Change Advisory Board
- The Architecture Team

### *Contract Management*

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

The CAI Project Lead and the BTS Contract Manager will review the deliverables jointly.

# DELIVERABLES

### *Task Order Deliverables, Timelines, and Frequency*

CAI and BTS 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<br>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<br>Includes:<br>• Risk Management Assessment<br>• Verification of Project Deliverables<br>• Project Management Assessment<br>• Verification of Product Deliverables (this will include verification only of vendor deliverable to date) | One Time<br>Due 3 weeks after the City's acceptance of the QAMP.<br>CAI will deliver an initial draft on 3/23/12. |
| Monthly Reviews and Reports<br>Include:<br>• Project status<br>• Recommendations<br>• Progress compared to established baselines<br>The report will primarily be formatted from a template provided by TOC. It is a MS/Excel workbook with individual sheets for each of four main evaluation areas:<br>• Risk Management<br>• Project Deliverables<br>• Project Management<br>• Product Deliverables | 7 reports over 9 – 12 months<br>CAI and the Project Manager will select which months to deliver reports, and which months will not have a report. Months without a report will likely be months where the Project Manager and CAI feel there is least likelihood of significant status change.<br>For months when the report is to be created, it is due 10 business days prior to the monthly TOC meeting. |
| Post Implementation Assessment Report<br>Includes:<br>• Assessment of achievement against objectives<br>• Lessons Learned | One Time, after SAN go-live<br>CAI will interview key stakeholders and participants to develop this report, including lessons learned. |

# Quality Assurance Management Plan

## *Work Process*

CAI will provide the following eight important quality assurance services:

- Monitoring the application of the Project Management Methodology.
- 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.
- Monitoring and assessing the relationship between Project Team and the contractors supporting and/or working on the project.
- Assessing the completeness and appropriateness of the project and product deliverables.
- Monitoring the project's performance according to the project plan and schedule.
- Monitoring the quality of the work performed.
- Managing the project risks that could affect the project’s scope, budget, and timely completion.
- Proactively reviewing the project activities and suggesting process improvements.

## *Inputs from the City*

To facilitate the QA process, the City will provide project documents and access to project participants. Some documents are available at various stages of the project. Some document names may vary. Also, some documents may be combined, or generated in a less formal manner.

Project documents that the City will provide to QA include:

- Project initiation documents, including the Business Case, RFP, vendor agreements, Charter, and Scope Statement.
- Project planning documents, including the Project Management Plan (which in turn includes numerous subsidiary plans), and the schedule.
- Project Monitoring and Control documents, including minutes of meetings, intra-team status reports, reports to oversight committees, acceptance and sign-off documents, and other progress and issues reporting documents.

QA will need access to project personnel. Contact may be in person, by phone, or other e-mail. QA will ask for contact information on an as-needed basis. Personnel that may be contacted include:

- Project Sponsor.
- Project Manager.
- Project oversight, such as the Technology Oversight Committee, Steering Committee, Project Oversight Committee, Infrastructure Board, Change Advisory Board, and Architecture Team.
- Project team members, such as developers, analysts, testers, trainers, and deployment personnel.
- Vendors, including Structure and Hitachi.