Project Title	Portland Housing Bureau HDS Implementation	Reporting Date: November 2012
Quality Assurance Executive Summary		
Authored by:	*Edward L Bye*	
Overall Rating	**Green**	*Meets Expectations*
Overall Trend	*Improved over the last period*	
Overall Score	*Calculated*	**5.0**
Risk Management	*Carried from worksheet*	5.0
Project Deliverables	*Carried from worksheet*	4.9
Project Management	*Carried from worksheet*	4.9
Product Deliverables	*Carried from worksheet*	5.0
Reporting Summary	*Overall project meets or exceed expectations*	
Changes since last report		
Current Recommendations	*No recommendations required for this period*	
Status of Prior Recommendations		
Individuals Interviewed/Dates	*Meeting held on Friday December 7th.*	
Documents Reviewed/Dates	*HDS/PHB (PDF) Project Plan, HDS Status Report, Technical Issues Log .*	
Meetings Attended/Dates		

Assessment Area	Risk Management - R	Reporting Date -November 2012
Description		
Overall Rating	*Green*	
Overall Trend	*Improved*	
Overall Score	*Calculated*	**5.0**
Reporting Summary	*Meets or exceeds expectation for the month.*	
Recommendations		

Metric	Green 5 points	Yellow 3 points	Red 1 points	NA 0 points	Score	Trend ⇧ ⇔ ⇩	Reporting Summary
R1 - Does a Risk Management Plan exist for the project?	YES				5	⇧	
R2- As risks are encountered are they being confronted in a timely manner to determine a proper response strategy?	YES				5		
R3- Is the project experiencing variances from schedule baselines? Have significant milestones been missed? If so how frequently?	NO				5		
R4- Is the project experiencing variances from budget baselines? Are significant cost overruns occurring? Have significant milestones been missed? If so how frequently?	NO				5	⇧	
R5 – Are stakeholders engaged and aligned on project roles, authority and outcomes?	YES				5		
R6 – Do business and technology leadership have shared expectations for urgency and priority?	YES				5		
R7 – Are there risks with the solution provider's team or approach?	YES				5		
R8- Are the projects human resources appropriately skilled and prepared for the project?	YES				5		
R9 – Are technology risk being addressed and planned for?	YES				5		
R10 – Are factors external to the project negatively influencing the project team's ability to succeed?	NO				5		

Assessment Area	Project Deliverables - PR	Reporting Date -November 2012
Description	*A Verification of Project Deliverables by which the Contractor evaluators if deliverables are appropriately scoped and detailed with respective to the current phase, included but not limited to: Project Management Plan, Change Management, Project Budget, Project Schedule and Project Communications.*	
Overall Rating	*Green*	
Overall Trend	*Improved*	
Overall Score	*Calculated*	**4.9**
Reporting Summary	*All of the metrics for this reporting period either meet or exceed expectations.*	
Recommendations		

Metric	Green 5 points	Yellow 3 points	Red 1 points	NA 0 points	Score	Trend ⇧ ⇔ ⇩	Reporting Summary
PR1 – Does the project have a clearly defined business case with clear objectives and criteria for success and performance metrics?	YES				5		
PR2- Have all business, functional and technical requirements been clearly documented and prioritized by stakeholders?	YES				5		
PR3- Does the project have a realistic timeline based on a work breakdown structure analysis of required activities?	YES				5		
PR4 – Does the project have a realistic budget? Are adequate financial resources available to accomplish the projects goals?	YES				5		
PR5 – Does the project plan contain all tasks required to successfully deliver the project?	YES				4		
PR6 – Are estimates of schedule and cost realistic and include contingency to mitigate disruption?	YES				5		
PR7- Does the project have a formal Change Management Plan? Are changes to scope following these processes?	YES				5		
PR8 – Are communications on the project happening in a timely manner to the right audiences?	YES				5		
PR9 – Is the Project Manager actively managing schedule and tasks? Is the project plan up to date and accurately reflect project scope?	YES				5		
PR10 – Is the Project Manager taking appropriate action in response to the occurrence issues and risks?	YES				5		

Assessment Area	Project Management - PM	Reporting Date - November 2012
Description	*The Project Management assessment area evaluates the projects organization, roles and responsibilities and management oversight to ensure the project has engaged all stakeholders at the appropriate level and is provided clear authority, managerial support and business ownership.*	
Overall Rating	*Green*	*Meets most key Metrics for the period*
Overall Trend	*Improved*	
Overall Score	*Calculated*	**4.9**
Reporting Summary	*Meets or exeeds expecations for the month*	
Recommendations		

Metric	Green 5 points	Yellow 3 points	Red 1 points	NA 0 points	Score	Trend	Reporting Summary
PM1 – Does the project have an experienced project manager and executive sponsor assigned to the project?	YES				5		
PM2-Are all project roles and responsibilities clearly defined and assigned?	YES				5		
PM3- Is the City effectively leveraging its contractual authority to resolve issues with vendors and subcontractors?	YES				5		
PM4 – Are the Project Manager, Sponsor and Steering Committee heeding project warning signs and effectively managing risk?	YES				5		
PM5 – Is the project experiencing negative impacts due to unresolved issues?	No				5		
PM6 – Are business units and end users involved and participating as stakeholder in the project outcomes?	YES				5		
PM7 – Is the City properly prepared for the organizational and cultural changes that the project will affect?	YES				5		
PM8 – Has turnover occurred on key roles such as the PM, Sponsor, Steering Committee or leads? If so, are transitions being managed properly?	YES				4		
PM9 – Are accepted industry best practices for project management being followed?	YES				5		
PM10 – Does the project team have confidence that the project goals are obtainable given the project scope, budget and timeline?	YES				5		

Assessment Area	Product Deliverables - PD	Reporting Date November 2012
Description	*A Verification of Product Deliverables by which the Contractor verifies if product deliverables are of acceptable quality and delivered on agreed upon schedule and cost.*	
Overall Rating	*Green*	
Overall Trend	*Improved*	
Overall Score	*Calculated*	**5.0**
Reporting Summary	*All of the Metrics for the reporting period are being meet.*	
Recommendations		

Metric	Green 5 points	Yellow 3 points	Red 1 points	NA 0 points	Score	Trend	Reporting Summary
PD1 - Does the project have clear criteria for testing and acceptance?	Yes				5		
PD2- Is the vendor performing according to contract terms? Are they responsive to issues?	Yes				5		
PD3 - Are the vendor's methodologies and work processes compatible with the City standards and best practices?	Yes				5		
PD4 - Is the vendor showing discipline and diligence to reduce the impacts of change to the project and agreed upon scopes of work?	Yes				5		
PD5 - Are the vendors demonstrating best practice quality assurance processes and controls in the development of deliverables?	Yes				5		
PD6 - Are deliverables being provided that meet the business need and are fit for use?	Yes				5		
PD7 – Are deliverables provided of quality that meets or exceeds City requirements?	Yes				5		
PD8 - Is proper training, knowledge transfer and documentation accompanying all vendor deliverables?	Yes				5		
PD9 –Is staff turnover occurring on the vendor's project teams? Are contractual processes being followed for the reassignment of vendor staff to the project? Is proper knowledge transfer occurring?	Yes				5		
PD10 – Does the project manager have confidence that the vendor is able and committed to deliver the project on schedule with required scope?	Yes				5		