

| Project Title | Office 365 | Reporting Date: 9/9/2013 |
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| Quality Assurance Executive Summary | | |
| Authored by: | <i>Clifford Smith, PMP Case Associates, Inc.</i> | |
| Overall Rating | <i>Yellow</i> | |
| Schedule Rating | <i>Red</i> | <i>The project can expect schedule changes and likely schedule increases as the PM changes the project approach, and therefore the schedule. Schedule-related metrics assessed red: R3, R7, PR4, PR5, PR6, PM8.</i> |
| Budget Rating | <i>Yellow</i> | <i>The project can expect budget changes as the approach and schedule change. The budget increased \$455k (37%) since the previous report. Most of the increase is internal BTS labor. Budget-related metrics assessed red: R3, PR4.</i> |
| Scope Stability Rating | <i>Yellow</i> | <i>Some important project tasks are not yet defined. Scope-related metrics assessed red: R3, PM8, PD6, PD7. (note: In this context, scope is 'how the work is to be accomplished,' as well as product scope.)</i> |
| Overall Trend | <i>Slight Decrease</i> | <i>Prior Report Overall Score: 3.3</i> |
| Overall Score | <i>Calculated</i> | 3.2 |
| Risk Management | <i>Carried from worksheet</i> | 3.1 |
| Project Deliverables | <i>Carried from worksheet</i> | 3.0 |
| Project Management | <i>Carried from worksheet</i> | 3.3 |
| Product Deliverables | <i>Carried from worksheet</i> | 3.2 |
| Reporting Summary | <p><i>The PM was replaced. The new PM received approval from the SC to change the project approach. The project will upgrade users to Office 2013. Some time later, it will migrate users to Office 365. This reduces the PCI-driven risks. It may increase the project timeline and BTS labor costs.</i></p> <p><i>The project must develop a project approach narrative and a detailed schedule and budget. The schedule should include detail such as end user tasks for testing, training, and other deployment tasks. The schedule is very tight, though the new approach removes some of the date-driven risks. Schedule changes will likely cause budget changes.</i></p> <p><i>However, the project is progressing to the pilot stage.</i></p> | |

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| Changes since last report | <p>The overall rating decreased slightly from the prior report. Most Assessment Areas remained fairly steady. The Product Deliverables area decreased from 3.9 to 3.2. The team has not been able to test a migration, and dates are slipping.</p> <p>The project developed a new approach to reduce risk. The effects these changes have on the schedule and budget are not yet final. The new approach and the PM's learning curve for the City project methodology slowed the development of a detailed schedule and budget. These project requirements will get much more critical very soon.</p> |
| Current Recommendations | <p>10. Identify and include Training Coordinators from each bureau.</p> <p>11. Develop a project approach narrative to be elaborated into a schedule.</p> <p>12. The Project Manager should intervene with Planet Tech. to ensure that the vendor delivers on time and with the needed quality.</p> |
| Status of Prior Recommendations | <p>1. The Project should identify additional risks. This could be part of a larger project-wide Risk Management meeting, or a Risk Mgmt. agenda item in the regular meetings. Status: The PM improved Risk Matrix and added many new risks. Complete.</p> <p>2. Carry Assumptions from the Charter forward to the Risk Matrix. Status: Not yet.</p> <p>3. Expand the Risk Matrix to include risk response plans and status for each risk. Status: Complete.</p> <p>4. Finalize the schedule and budget. Status: In process. Finalizing the schedule should entail a project approach narrative that is elaborated into the schedule.</p> <p>5. Finalize end user training plans, particularly any needed funding for presentation-based training. Status: This is dependent on the schedule finalization (prior recommendation).</p> <p>6. Finalize day-1 floor support needs for end user deployments. Status: This is dependent on the schedule finalization (prior recommendation).</p> <p>7. Identify funding options for potential new and additional costs for training and staff for a longer project. Status: This is dependent on the schedule finalization (prior recommendation).</p> <p>8. Clearly define project roles, communications, and approach for all project participants. Status: The PM is updating the Org. Chart. This recommendation also entails identification and inclusion of Tr</p> <p>9. The Planet Tech. work has been acceptable. But the city must be more assertive to ensure that deliverables Status: The City has been more active with Planet Tech. But dates are slipping as the project has not tested a</p> |
| Individuals Interviewed/Dates | <p>Emily Rice 8/9/13, 8/29/13 Mark Van Patten 8/9/13, 8/26/13, 8/27/13, 8/29/13, 9/4/13 Saby Waraich 8/30/13 Brian Pirello, Server Support 9/4/13</p> |

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| Documents Reviewed/Dates | <i>Office 365 Risk Matrix 2013 08 29</i> <i>ESC - Office 365 Presentation 8-15-13</i> |
| Meetings Attended/Dates | <i>TOC Meeting 8/19/13, 9/16/13</i> <i>Executive Steering Committee 8/15/13, 8/29/13, 9/12/13</i> <i>TOC Report Review w/PMO Mgr. and new PM 8/9/13, 9/5/13</i> |