Technology Services Board Portfolio and Policy Subcommittee Meeting

January 10, 2019

9:00 a.m. – 11:00 a.m.

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AGENDA

TOPIC	LEAD	PURPOSE	TIME
Welcome and opening remarks	**Jim Weaver**	**Introduction**	**9:00**

Project Briefing
• **Employment Security Department – Paid Family & Medical Leave (PFML)**
   ○ **Suzi LeVine, Executive Sponsor**
   ○ **Carla Reyes, Program Director**
   ○ **Linda Kleingartner, Project Manager**
   ○ **Cami Feek, Business Sponsor**
   ○ **Jamie PoVey, Public Consulting Group, Inc., QA**
   ○ **John Grieco, Public Consulting Group, Inc., QA/Agile Coach**
	Sue Langen
	Pamela Davis-Taggart
		Update / Feedback	**9:15**

Project Briefing
• **Office of Financial Management – One Washington**
   ○ **Pat Lashway, Executive Sponsor**
   ○ **Vann Smiley, One Washington Executive Director**
   ○ **Matthew Meacham, Program Director**
   ○ **Bill Kinney, Project Manager**
   ○ **Anna Brannen, Bluecrane, Inc., QA**
	Sue Langen
	Pamela Davis-Taggart
		Update / Feedback	**9:45**

Project Briefing
• **State Board for Community & Technical Colleges - ctcLink**
   ○ **Jan Yoshiwara, Executive Sponsor**
   ○ **Christy Campbell, Project Director**
   ○ **Grant Rodeheaver, CIO**
   ○ **Paul Giebel, Moran Technology Consulting, QA**
	Sue Langen
	Whitney Dickinson
		Update / Feedback	**10:15**

Public Comment			**10:45**

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Current TSB Portfolio & Policy Subcommittee Members

Industry Members Butch Leonardson – Leonardson Leadership Svcs (webex) Paul Moulton – Costco (webex)	**Legislative Members** Rep. Zack Hudgins - House D Sen. Patty Kuderer - Senate D
Executive Branch (Agency Directors) Jim Weaver – State CIO and TSB Chair Vikki Smith – DOR Tracy Guerin – DRS	**Other Government** Jeff Paulsen – Labor Rep

Blue – members present
Black – members absent

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Welcome / Opening Remarks

Introduction

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Project Briefing - PFML

Update / Feedback

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Washington Paid Family & Medical Leave

Employment Security Department
WASHINGTON STATE

Technology Services Board Portfolio & Policy Subcommittee Meeting
January 10, 2019

Suzi LeVine, Commissioner
Employment Security Department

Carla Reyes, Paid Family and Medical Leave Director
Employment Security Department

Presentation overview

Introductions

Program Summary

Technology Project Update

Key Lessons

QA Update

Questions

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Paid Family and Medical Leave Program Summary

"**Paid Family and Medical Leave helps the employees, helps the business and it helps the community at large** and it is something I am proud to be a part of."
– *Jed Fowler, owner of H.D. Fowler, 12 locations across WA*

"It is important for my staff to have access to extended leave and medical leave. Paid Family and Medical Leave is a great new benefit for our state."

 – *Phuong Tran, owner of Lava Java in Ridgefield*

"Having the ability to take **time off allows employees to come back and be productive** knowing everything is taken care of."

– *Carlos Rodriguez Vega, Grocery Outlet store owner in Vancouver*

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What is Paid Family and Medical Leave?

- ✓ Insurance program for Washingtonians who need **time to care** for themselves or their loved ones.

- ✓ Position WA as a **leader in a globally competitive economy**.

- ✓ All Washingtonians have access to **critically important paid leave** during major life events.

Care for family

Birth or placement of a child
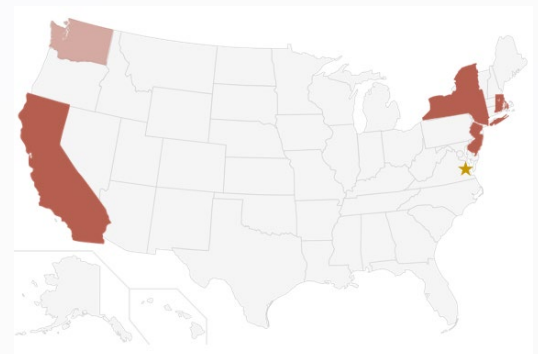
Military-related events

Your own medical condition

Small business assistance

$1,000 to $3,000

WA is 1 of 5

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A whole new program – from the ground up

Operations & Care Team
- ✓ Establish a new operating division
- ✓ Establish a Customer Care Team
- ✓ Develop all standard operating procedures.

Technology
- ✓ Build out all necessary supporting technology for employer, employee, and internal customer facing service administration.

Rules & policies
- ✓ Promulgate WACs and program policies to implement the law

Outreach & communications
- ✓ Conduct outreach statewide to employers, third party administrators, accountants, employees and health care providers.

Finance & accounting
- ✓ Establish financial accounting procedures and secure banking relationships.

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Technology project update

Build out all necessary supporting technology for program administration.

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Technology budget

Technology Budget Approved in March 2018 Investment Plan

Implementation Costs	$57,989,493*
Maintenance Costs	$25,568,376*

Current Budget Projections

Implementation Costs	$49,978,000
Maintenance Costs	$13,147,000

*Approved budget includes contingency.
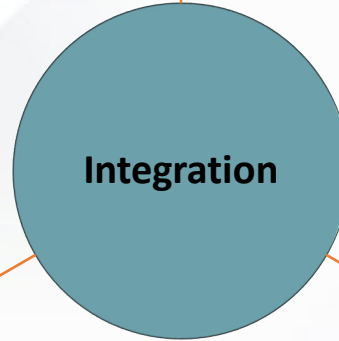
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Technology platform

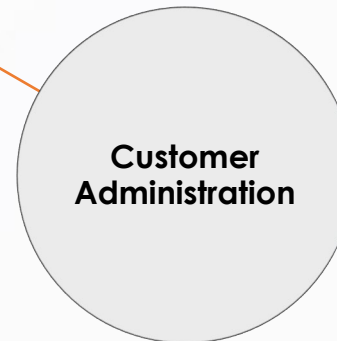Public facing system customers use—this can be accessed via desktop or mobile device. *Deloitte custom development.*

Centralized business rules engine; data interfaces; and routing, job and batch processing control.
Deloitte custom development.
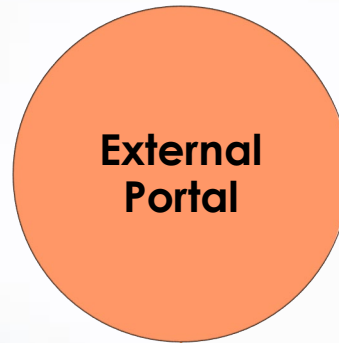
External Portal

Integration

Accounting

Customer Administration

4   System components
+
3   System partners,
QA and OCIO
=
1   Cohesive team

System used by ESD Finance to track and manage financial transactions. *Microsoft Dynamics/AX.*

System used by ESD Staff to support customers and program administration. *Microsoft Dynamics CRM.*

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Project schedule update

7/5/2017
Paid Family and Medical Leave bill signed

10/19/2017
All technology RFPs issued

Tech contracts signed 3/2018

Ongoing
5/15/2018
Release plans and backlog developed

6/15/2018
Operating division resources in training

Done 9/17/2018
8/1/2018
Voluntary plan applications

Today

1/1/2019
Employers begin collecting premiums

Care Team #4 starts 2/1/2019

5/26/2019
Collect Q1 premiums

1/1/2020
Benefit claims begin

"I am truly impressed with (the) responsiveness, professionalism and customer service. (The) expertise, guidance and support deserve a top 5-star rating…If your goal is to be the best state agency for customer service, you've nailed it! Keep up the good work." – Customer e-mail 12/13/2018

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Key activities to support schedule

April 2018 to September 2018

Operating Division
- Onboard operations team
- Set up facilities and telephony
- Develop business processes/SOPs
- Onboard Project Manager
- Accept Voluntary Plan payments (Check only)

Rules and Policies
- Write WAC and policies to support Voluntary Plans

Communication and Outreach
- Onboard communications team
- Develop Communications plan/strategy
- Establish communication tools and products
- Branding/marketing development
- Conduct outreach activities

Financial Accounting
- Establish accounting procedures
- Establish banking operations to process payments

Build Technology to Support Program Operations
- Onboard ESD development team & Vendor teams
- Conduct discovery
- Obtain customer input on design and usability
- Establish product backlog
- Develop a release plan and product roadmap
- **Build, test and deploy technology platform**

September 2018 to April 2019

Operating Division
- Continue onboarding operations team
- Continue developing business processes/SOPs
- Process Waivers (manual process) & Elective Coverage
- Accept employer wage reporting & premium payments

Rules and Policies
- Write WAC and policies to support Employer reporting, premium collection and begin Benefits-related rule-making

Communication and Outreach
- Conduct communications and outreach to prepare employers for wage reporting/premium collection

Financial Accounting
- Refine accounting procedures
- Monitor and refine banking operations to process payments

Build Technology to Support Program Operations
- **Build test and deploy features for employer reporting and premium collections to the technology platform**
- **Enhance and maintain technology platform and add new functionality**
- Continue building and refining backlog for employer reporting, premium payments

February 2019 to January 2020

Operating Division
- **Continue onboarding operations team**
- **Continue developing business processes/SOPs**
- **Process benefit claims**
- **Issue benefit payments**
- **Conduct audit and quality assurance activities**

Rules and Policies
- **Write WAC and policies to support Benefits, Appeals, etc.**

Communication and Outreach
- **Conduct communications/outreach to prepare for benefit claims**

Financial Accounting
- **Build accounting procedures/banking operations to support benefit payment issuances**

Build Technology to Support Program Operations
- **Enhance/maintain technology platform; add new functionality**
- **Build/refine backlog for benefit processing, QA, etc.**
- **Build, test & deploy features--benefit processing, QA, etc.**

1/10/2019

15

Technology challenges

Challenge	Response	Result
Technology platform was not ready to deploy by August 2018	Enacted contingency plan to use manual processes and alternate technical tools	Voluntary Plans launched successfully 9/17/2018
Microsoft CRM 8.2 not compatible with State ADFS	Microsoft upgraded to CRM 9.0	Upgrade completed successfully and technology platform rebuild complete in Dev-Test-Int. Test Environments 12/31/2018
10/2018 assessment: Current software development speed would not yield on-time delivery	Revised system architecture Established bulk-processing team	Rate of completion for software development increased by 100%
Timelines for delivery are tight	Project status will remain red Team will continually monitor progress and move quickly to address new challenges	Next checkpoint 1/18/2019

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Technology Go/No-Go Readiness Scorecard

| Criterion	Feature complete	Platform readiness	Security & Performance Readiness	Organizational/End-User Readiness	ESD Financial & Accounting Readiness	System Operations & ITSD Readiness	Cutover Activities
Status	At risk	High risk	At risk	On target	On target	At risk	At risk

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Key lessons

- ✓ Building an entire program in parallel creates gaps/slows technology development
- ✓ Teams need time to form and organize
- ✓ ESD's highly qualified and experienced technical team members are a key to successful technology deployment
- ✓ People need time to familiarize themselves with new technology products in order to successfully design, build, deploy and maintain them
- ✓ There is a learning curve to transition from Waterfall to Scaled Agile software development
- ✓ Comprehensive documentation from Vendors is necessary to guide timely deployment of technology products
- ✓ Strong, collaborative vendor relationships are a critical ingredient to success
- ✓ Establishing and driving to MVP early results in more rapid development
- ✓ Adaptive/nimble culture supports change required to improve outcomes

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QA Project status

Assessment Category	Quarterly Trending Status			Risk Highlights	Associated Risks
	November	December	January	12/31/2018	12/31/2018
Integration Management	🟢 =	🟢 =	🟢 =	-	-
Scope Management	🔴 =	🔴 =	🔴 =	-	QA04, QA25
Schedule Management	🔴 =	🔴 =	🔴 =	*Decreased QA05* QA28 (*NEW*)	QA28 (*assessing*)
Cost Management	🟡 =	🟢 +	🟢 =	-	QA24
Quality Management	🟡 =	🟢 +	🟢 =	-	-
Human Resource Management	🟡 =	🟡 =	🟡 =	-	QA18
Communications Management	🟢 +	🟢 =	🟢 =	-	QA10b
Risk Management	🟢 =	🟢 =	🟢 =	-	-
Procurement Management	🟢 =	🟢 =	🟢 =	-	QA26
Stakeholder Management	🟢 =	🟢 =	🟢 =	-	QA23
Technical Management	🔴 --	🔴 =	🟡 +	*Decreased QA27*	QA22, QA27

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19

QA Critical success factors (as of 12/31/2018)
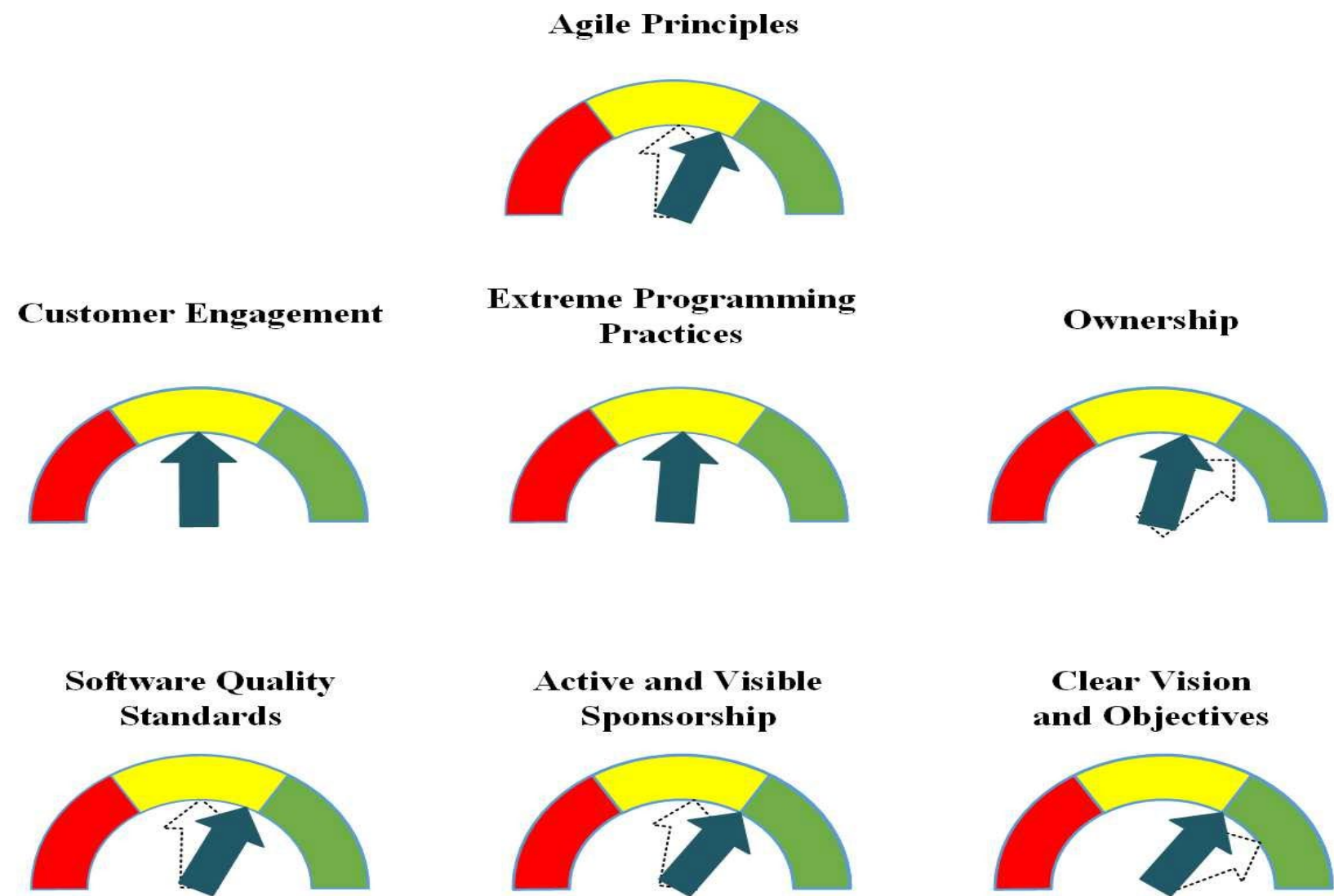
Questions?

Carla Reyes

Director, Paid Family & Medical Leave

Washington State Employment Security Department

(360) 485-2349

CReyes@ESD.WA.GOV

Visit us online at www.paidleave.wa.gov

Join our listserv at bit.ly/PaidLeaveList

Ask questions and make comments on our public forum at bit.ly/CommentForum

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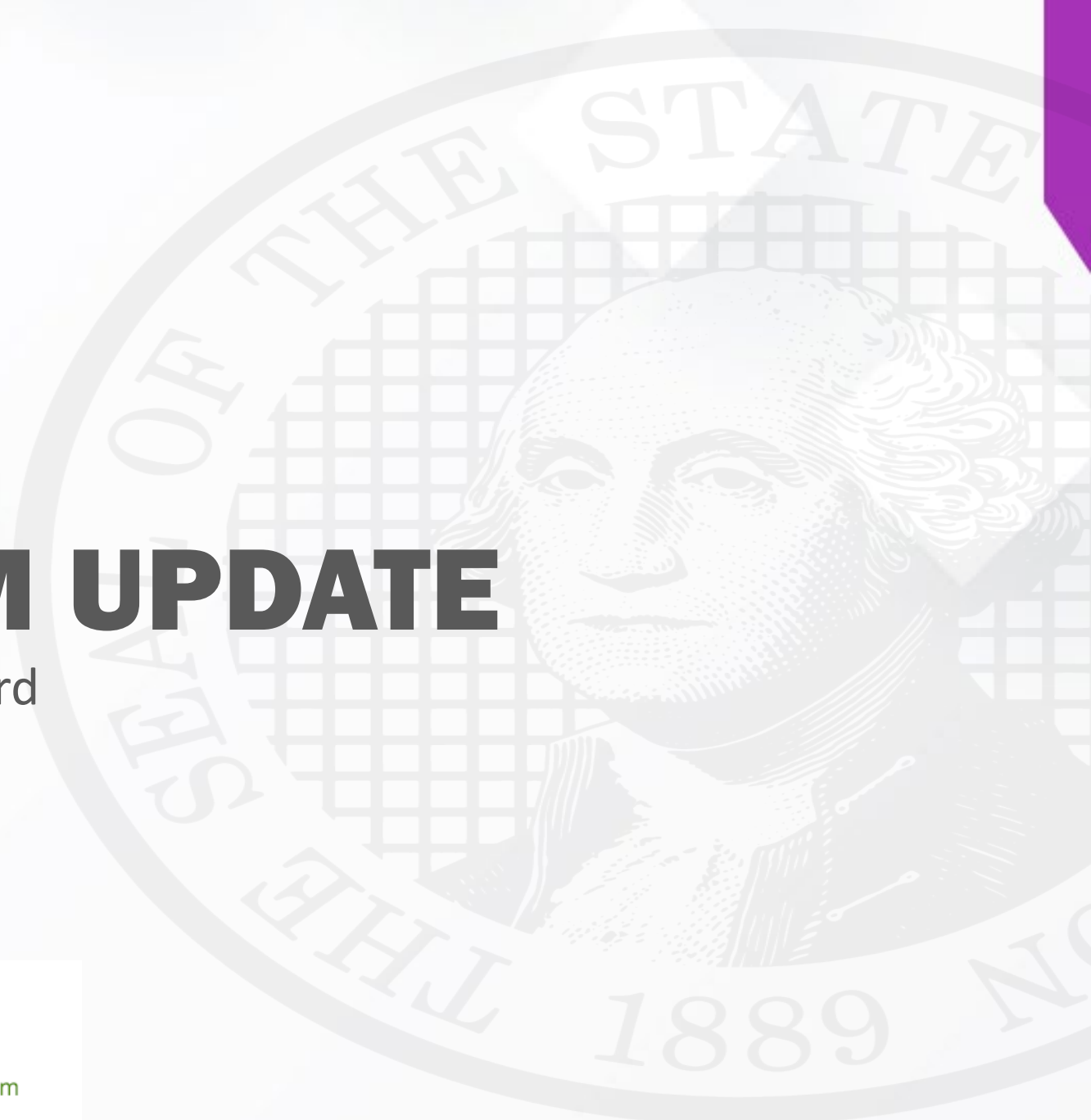# Project Briefing – One Washington

Update / Feedback

JANUARY 10, 2019

PROGRAM UPDATE

Technology Services Board

One Washington
A Business Transformation Program

Agenda

- Welcome and introduction
- Greetings from Vann
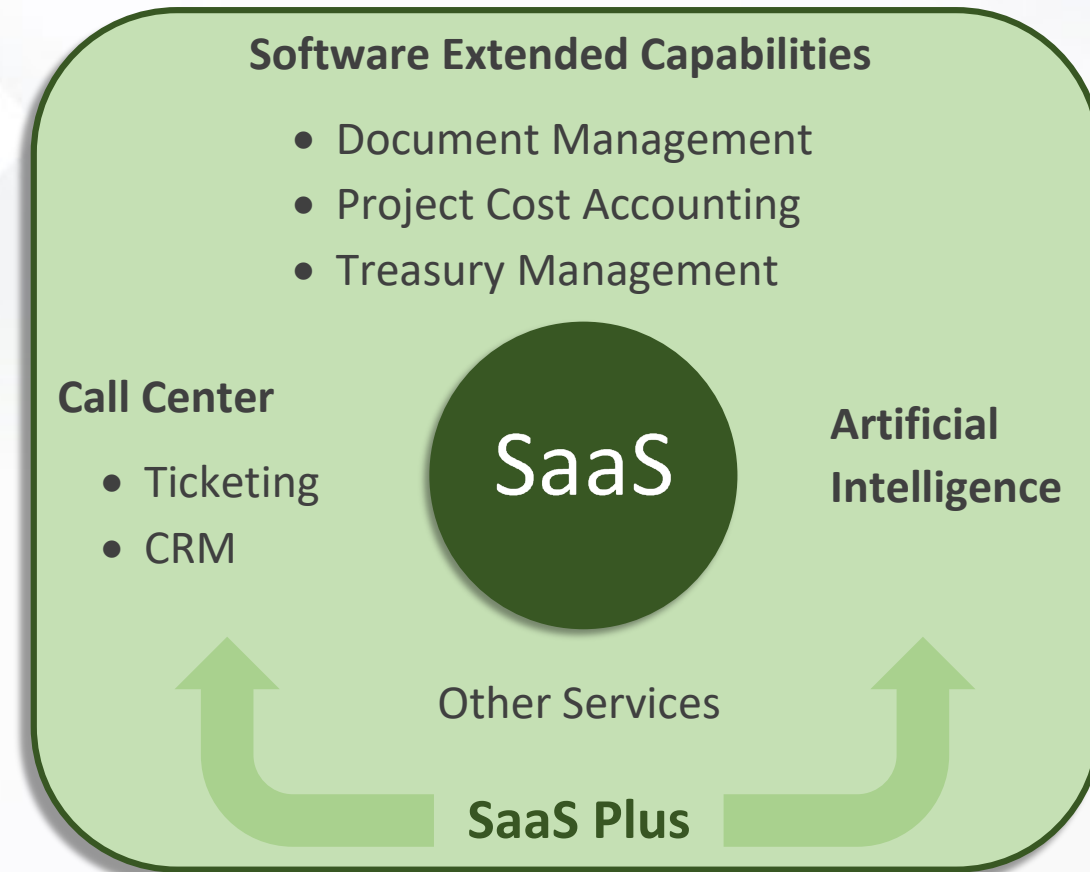- Program restructure
- What you need to know

Program Restructure - Scope

Driving factors:

1. ESC decision to pursue SaaS Plus

2. Agency readiness

3. Budget constraints

Core elements:

1. Conclude SaaS Plus procurement

2. Agency readiness

3. Program readiness

4. Organizational change management

Software Extended Capabilities

- Document Management
- Project Cost Accounting
- Treasury Management

Call Center

- Ticketing
- CRM

SaaS

Artificial Intelligence

Other Services

SaaS Plus

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Program Restructure – Core Elements

Conclude SaaS Plus procurement:

- Expand scope to include Budget and HR/Payroll capabilities

- ERP procurement assistance

- ERP expert

- Legal expertise - Assistant Attorney General

Continue with more in-depth technology readiness activities:

- Complete a comprehensive data gathering initiative

- Update integration plan

- Ensure complete inventory of agency systems and integrations
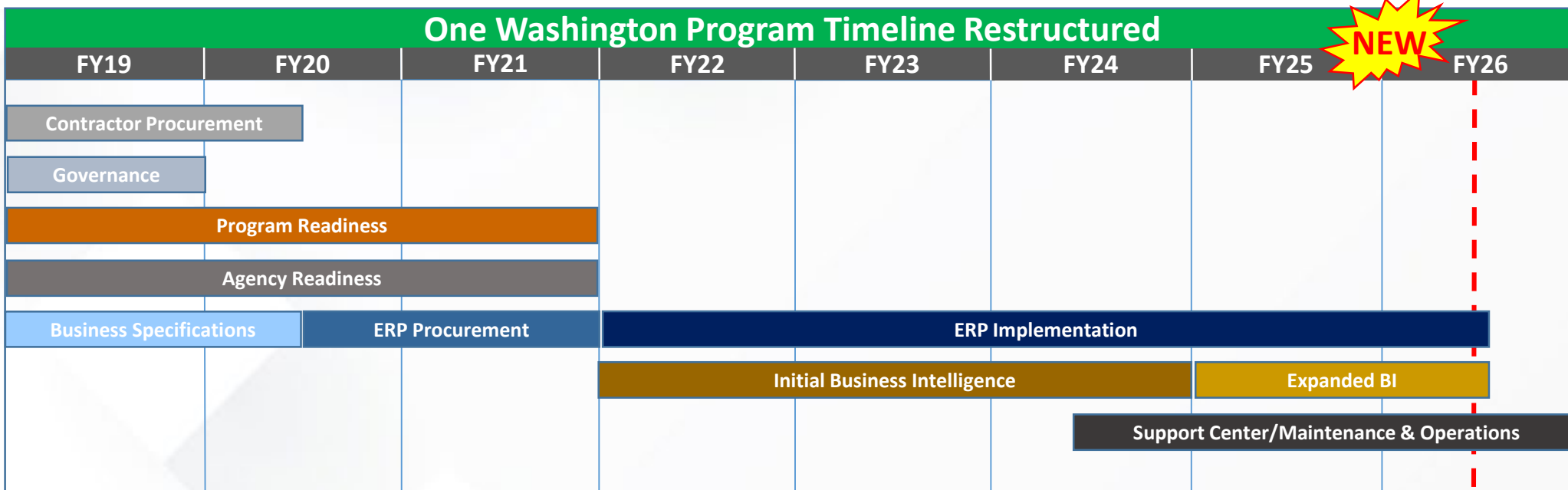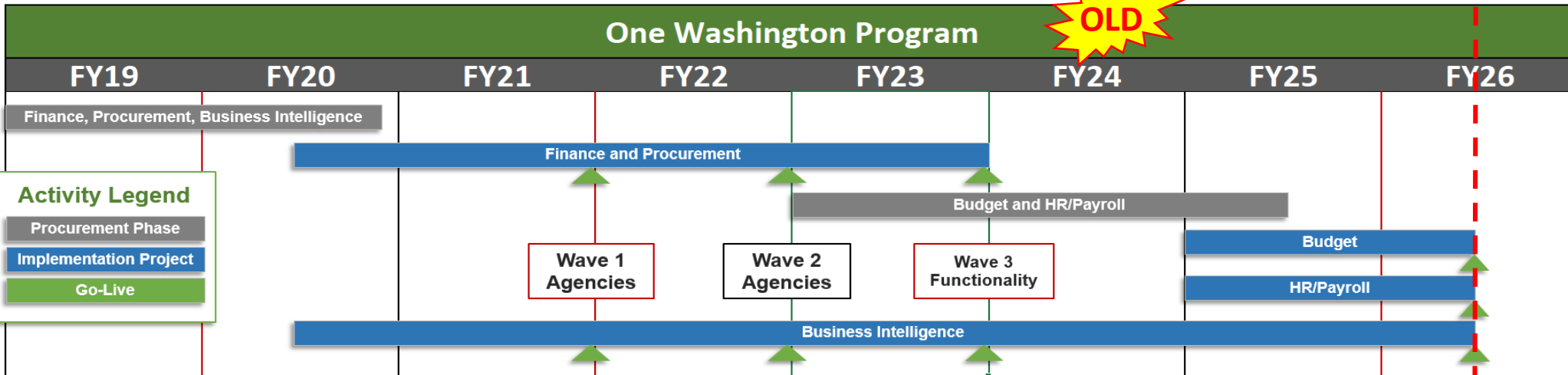
Build capability for the program:

- Fully staff the Program Management Office

- Add technical expertise:
    - Chief Technology Officer
    - Chief Information Security Officer
    - Consultant support in specialized technical areas

- Implement a model office

- Develop information technology and business operating models

Procure organizational change management services with ERP implementation experience:

- Develop a comprehensive change management plan
    1. Baseline agency readiness assessment
    2. Communications plan
    3. Stakeholder engagement plan
    4. Coaching plan
    5. Resistance plan
    6. Training plan

- Benchmarking study

- Document current agency processes

- Agency change management pool

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Program Restructure – Schedule

One Washington Program — OLD

| | FY19 | FY20 | FY21 | FY22 | FY23 | FY24 | FY25 | FY26 |

- Finance, Procurement, Business Intelligence
- Finance and Procurement
- Budget and HR/Payroll
- Budget
- HR/Payroll
- Business Intelligence

Wave 1 Agencies
Wave 2 Agencies
Wave 3 Functionality

Activity Legend
- Procurement Phase
- Implementation Project
- Go-Live

One Washington Program Timeline Restructured — NEW

| | FY19 | FY20 | FY21 | FY22 | FY23 | FY24 | FY25 | FY26 |

- Contractor Procurement
- Governance
- Program Readiness
- Agency Readiness
- Business Specifications
- ERP Procurement
- ERP Implementation
- Initial Business Intelligence
- Expanded BI
- Support Center/Maintenance & Operations

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28

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Program Restructure – Decision Package

Requested:
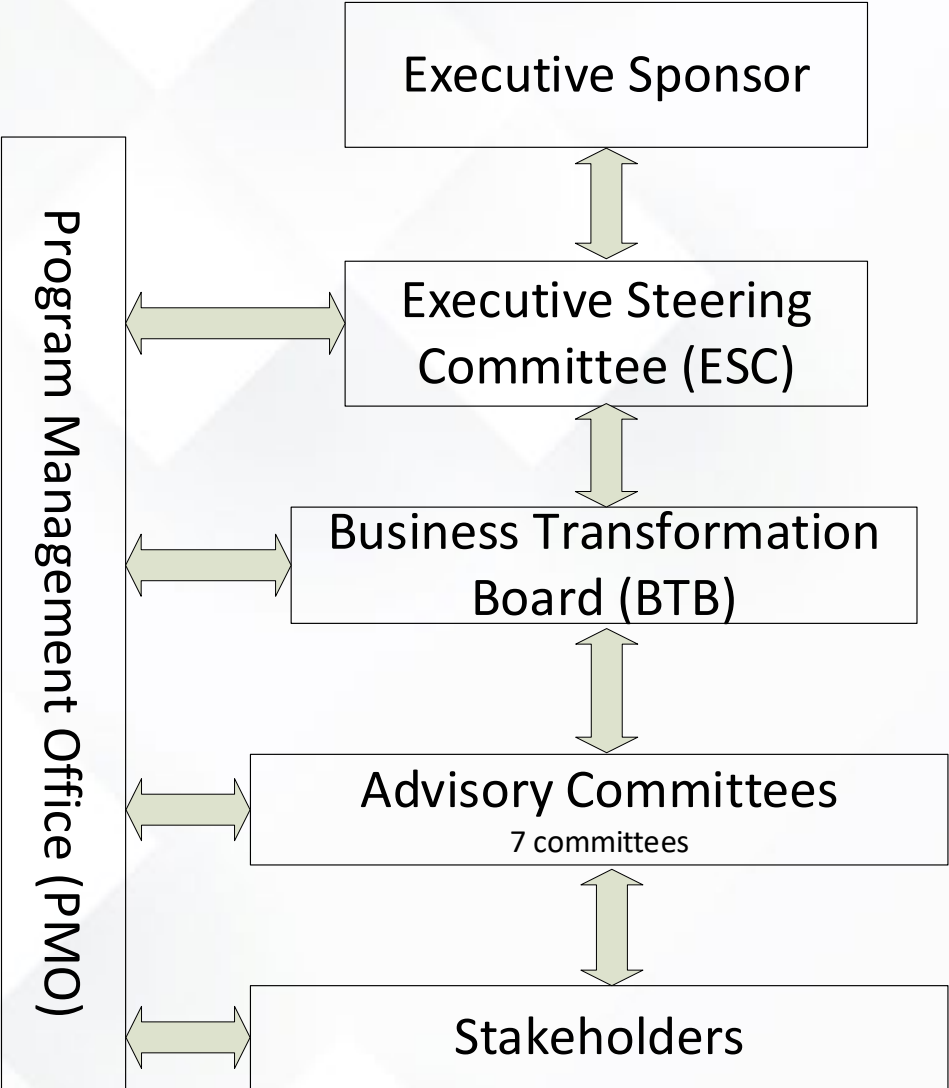
$3,298,000	One Washington carry forward
$29,344,000	Business readiness activities
<u>$27,419,047</u>	Agency change management
$60,061,047	Total

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BUSINESS TRANSFORMATION BOARD AND ADVISORY COMMITTEES

New Governance Structure

Program Management Office (PMO)

Executive Sponsor

- Single point of authority and accountability
- Authority to make decisions on any matter escalated by the ESC or Executive Dir.

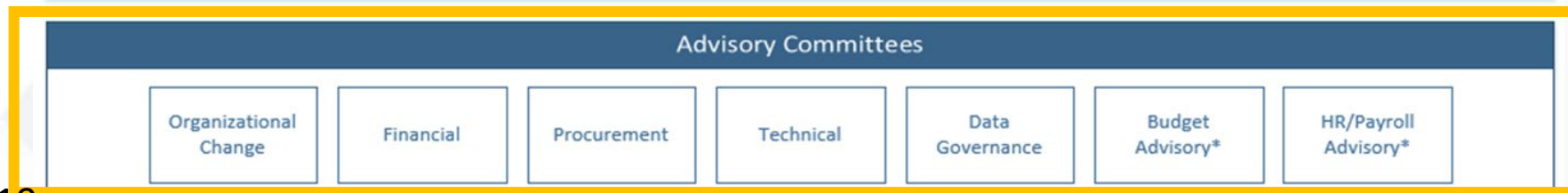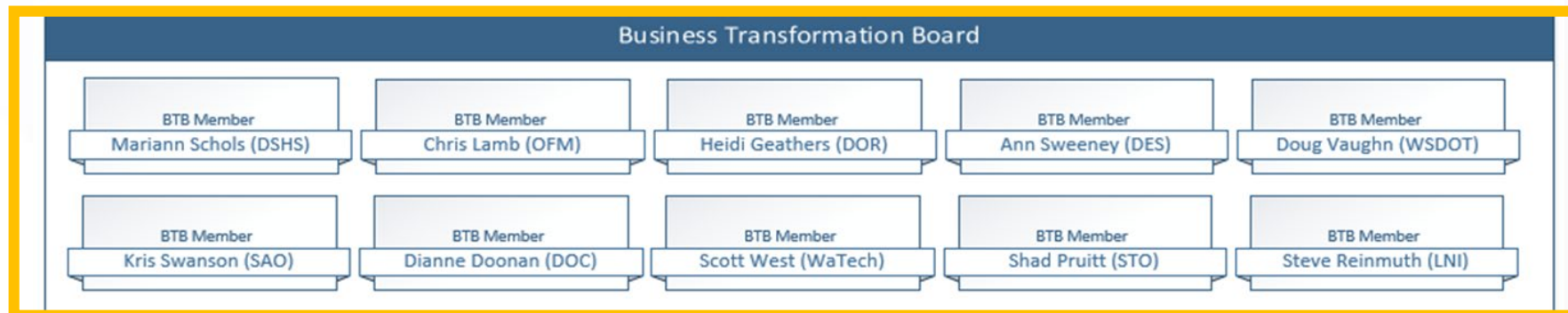**Executive Steering Committee (ESC)**

- Manage scope, schedule & budget
- Manage milestones
- Resolve inter-agency issues

Business Transformation Board (BTB)

- Resolve enterprise-wide issues
- Recommend issues to escalate to ESC
- Deliver capabilities
- No authority over schedule, scope, budget

Advisory Committees
7 committees

- Flexible
- Rapid decision making
- No authority to change requirements
- No authority over schedule, scope, budget

Stakeholders

- All agencies represented
- Decisions at lowest level - efficiency

1/10/2019

31

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Business Transformation Board / Advisory Committees

Advisory Committees and Members

Organizational Change - John Wright

DOR	Cyndee Baugh
WSDOT	Wendy Carney
DES	Emily Poyner
DOC	James Dunivan
DSHS	Jessica Armstrong
DOL	Jerimiah Wedding
OFM	Lenora Sneva

Financial — Brian Tinney

DRS	Cathy Cale	ESD	Sandi Fairchild
DES	Jamie Langford	DFW	Lee Rolle
WSDOT	Jennifer Dahl	DSHS	Mariann Schols
DOR	Dan Contris	LNI	Sharon Elias
WaTech	Wendi Gunther		

Procurement — Cheral Manke (DES)

DOC	Daryl Huntsinger	DES	Keith Kawamura
LNI	Tammie Wilson	WSDOT	Allison Crothers
DOR	Heidi Whisman	DSHS	Monika Vasil
DOL	Greg Zayas	WSP	Simon Tee
OFM	Bonnie Lindstrom		

Technical - Anthony Shepard

WSDOT	Matt Modarelli
SIB	Stephen Backholm
WSP	Tom Wallace
WaTech	Mark Quimby
DES	Bijal Karia
DFW	Paul Aneja
DOC	Debbie Kendall
DOL	Misty Jean Brown
DSHS	Samreth Sam
HCA	Jerry Britcher
OFM	Margaret Larkey

Data Governance — Lori Jones

DSHS	OFM	OFM	DNR
Robin Kingery	Angie Hogenson	Kenneth Adams	Steve Young
OFM	HCA	DES	DES
Ben Guyer	Dan Ashby	Rex Brown	Rebecca Linville

Budget Advisory | HR/Payroll Advisory

The Budget and HR/Payroll Advisory Committees will be activated at a future date.

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One Washington QA Response

Executive Dashboard Assessment Area	RISK STATUS			
	Sept	Oct	Nov	Dec
Program/Project Management & Sponsorship				
Program/Project Schedule	Yellow	Blue	Yellow	Yellow
Staffing	Yellow	Yellow	Yellow	Yellow
Budget	Blue	Blue	Yellow	Blue
PMO Processes: Change, Risks, Issues, Quality Management	Blue	Blue	Blue	Blue
Governance	Blue	Blue	Blue	Blue
Tools	Blue	Blue	Blue	Blue
Scope	Green	Green	Yellow	Yellow
Contract Management/Deliverables Management	Green	Green	Red	Red
People				
Organization Change Management	Yellow	Yellow	Red	Red
Stakeholder Engagement	Blue	Blue	Yellow	Yellow
Business Readiness	Blue	Blue	Red	Red
Business Processes/System Functionality	Green	Green	Red	Red
Application				
Requirements, Design, Development and Configuration	Blue	Blue	Red	Red
Integrations	Green	Green	Red	Red

1/10/2019

34

One Washington QA Response

Change since prior report	Quality Assurance Assessment	One Washington Response
Risks Are Decreasing	Contract Management/Deliverables Management	- ERP procurement assistance - ERP expert - Fully staff Program Management Office
Risks Are Decreasing	Organization Change Management	- Develop comprehensive change management plan - Benchmarking - Document current agency processes
Risks Are Decreasing	Business Readiness	- Extend readiness timeline - Agency OCM pool - Implement model office - Develop IT and business operating model
Risks Are Decreasing	Business Processes/System Functionality	- Continue with more in-depth technology readiness activities - Fully staff the Program Management Office - Add technical expertise
None	Requirements, Design, Development and Configuration	- Expand scope of procurement to include Budget and HR/Payroll capabilities - Extend timelines for procurement
None	Integrations	- Add technical expertise - Expand scope of data gathering activities

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FOR MORE INFORMATION:

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TO PROVIDE FEEDBACK:

onewa@ofm.wa.gov

One Washington
A Business Transformation Program

Project Briefing - ctcLink

Update / Feedback

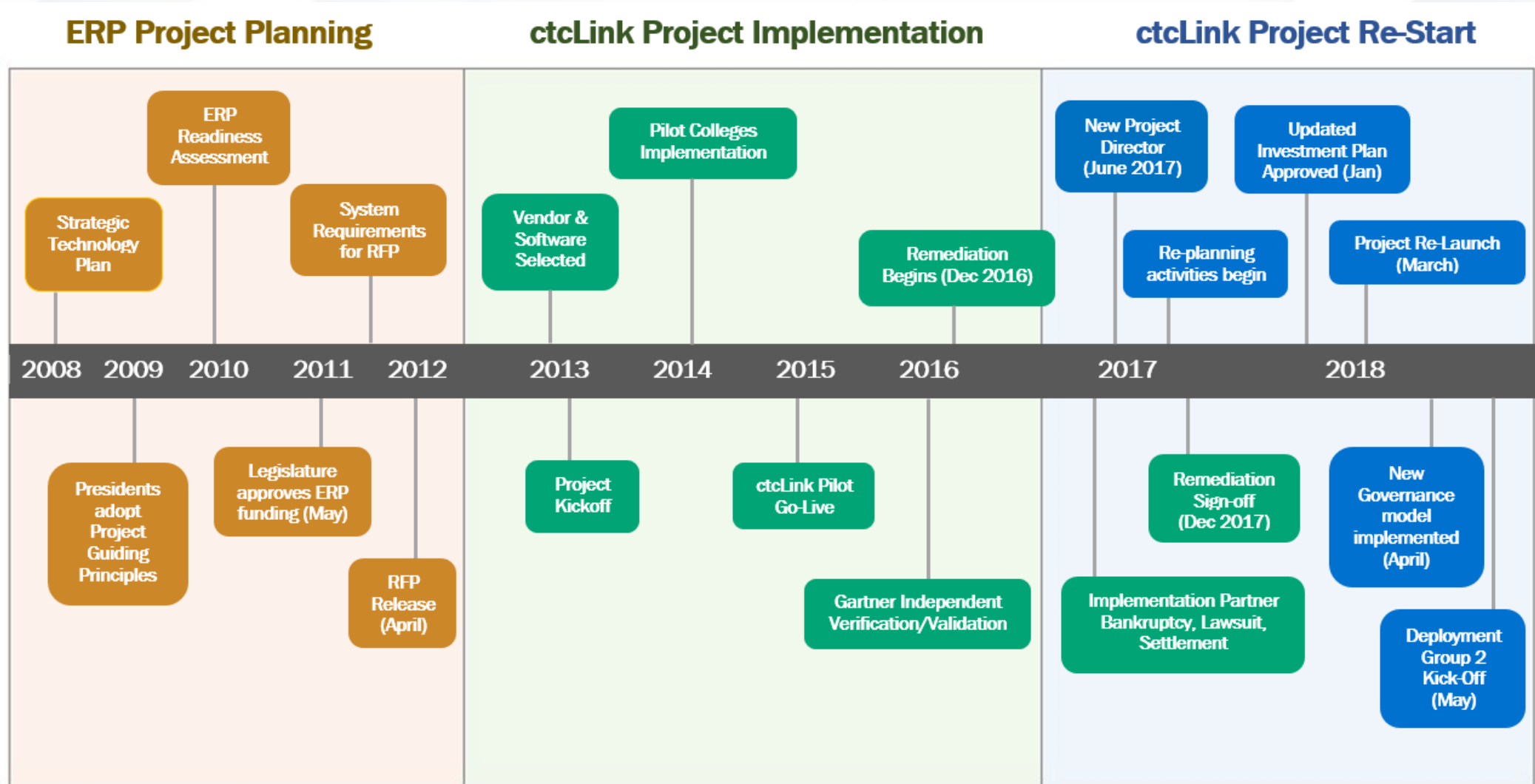WA - Office of the
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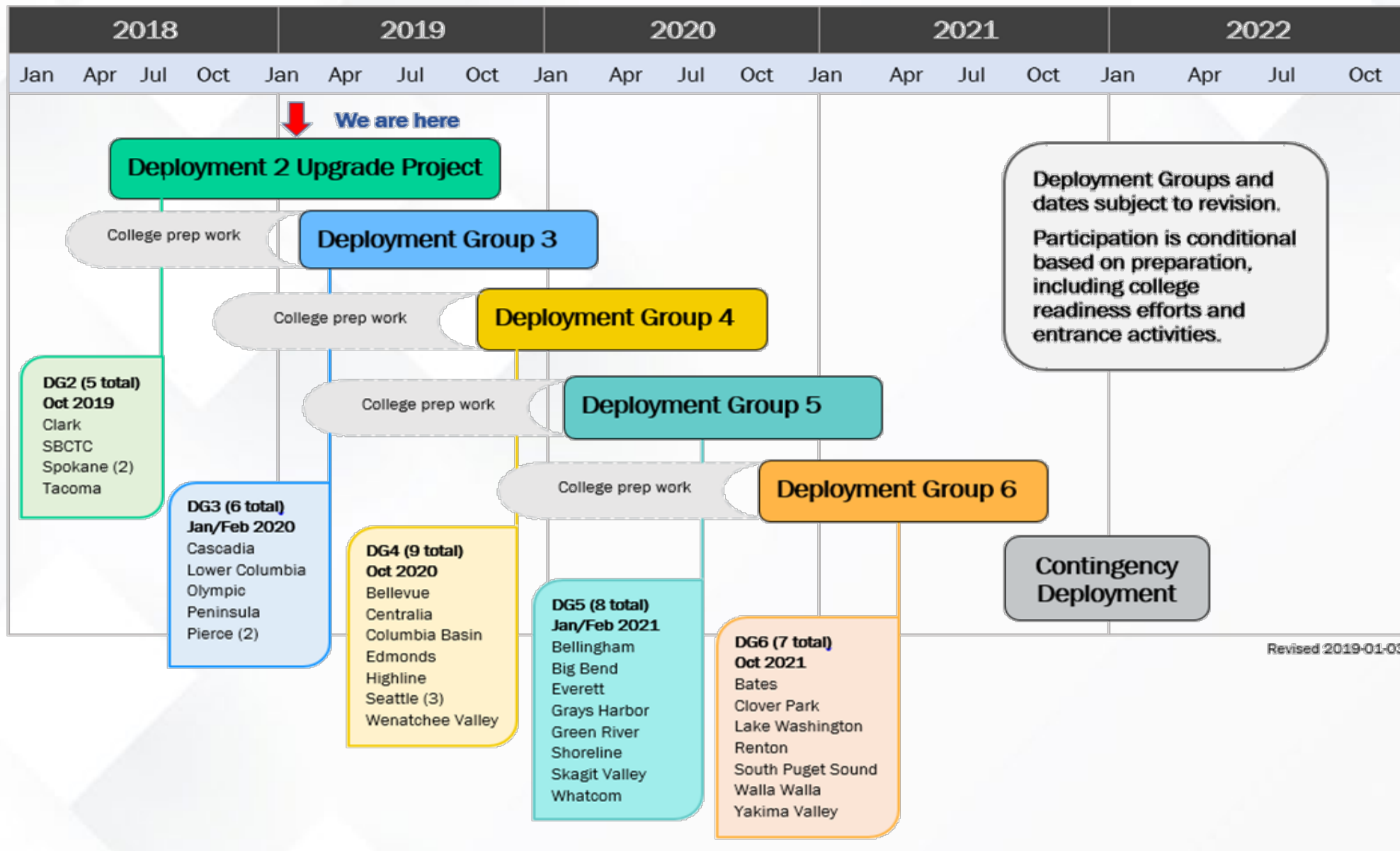
ctcLINK PROJECT REPORT

Technology Services Board Portfolio/Policy Subcommittee Meeting
January 10, 2019

- **Jan Yoshiwara** – SBCTC Executive Director, ctcLink Executive Sponsor and ctcLink Executive Leadership Committee Co-Chair
- **Grant Rodeheaver** – SBCTC Deputy Executive Director of Information Technology (CIO) and ctcLink Project Sponsor
- **Christy Campbell** – SBCTC ctcLink Project Director
- **Paul Giebel** – Moran Technology Consulting, External Quality Assurance
- **Bob Knight** – Clark College President and WACTC President
- **Joyce Loveday** – Clover Park Technical College President & ctcLink Executive Leadership Committee Co-Chair

CTCLINK PROJECT EVOLUTION

1/10/2019

DEPLOYMENT GROUPS & TIMELINE

Overall	**G**	• Program is on track and making expected progress • Key activities are being executed per timeline and budget	Scope	**Y**	• Monitoring scope and timing of Chart of Accounts, Budgeting Tool, Continuing Education, Online Admissions Application, and OBIA implementations
Schedule	**Y**	• Analyzing resource overlap between DG2 and DG3 tasks • Project Plan has been baselined but will need a second baseline once training activities are defined	Budget	**G**	ctcLink Budget currently tracking under budget: • Delayed hiring • Timing of re-implementation of solutions (Continuing Education, Online Admissions Application, Budget)

LEGEND: **G** On track | **Y** Some issues, under control | **R** Significant issues, not under control

Executive Summary	Remediation	Status
The project is tracking per schedule and under budget. Review and definition of scope for each deployment is still underway due to the rework of key solutions. Deployment Group 2 (DG2) is in the Construct Phase, focused on Local Configuration, Conversion activities and Project Team Functional and Technical Unit Testing. DG2 Go-Live is scheduled for October 2019. DG3 is engaged in peer review and pre-kickoff activities, with an official DG3 Kick-off scheduled for January 28, 2019. DG4 will begin tracking Initiation Phase activities in January. Remediation work continues to be a priority, working in parallel with the Deployment activities. Following vendor demos in December, the Continuing Education workgroup expects a recommendation for ctcLink governance in January. The OAA workgroup reviewed online admission solutions in use at other colleges and is developing a short list of solutions for further evaluation.	**Campus Solutions**	13 of 45 remain open
	Financial Management	14 of 39 remain open
	Human Capital Management	9 of 25 remain open
	Faculty Workload	Package 2 postponed due to calculations issues discovered during testing, work in progress to resolve.
	DRS Redistribution	Waiting on approval of formula from SBCTC and then can complete the development.
	Absence Management	ERP Support SIT and then college UAT
	Security Audit Controls	Incorporated into Security Redesign
	Student Billing	ERP Support SIT and then college UAT
	Budget Planning Solution	Sub-committee begins Jan 2019 to review, finalize requirements
	Online Admissions Solution	OAA workgroup reviewing other OAA options. Discussions and demos with OAA preferred college solutions.
	Continuing Education Solution	RFP closed, proposals evaluated and vendor demos completed. Recommendation by work group to Governance pending.

Overall: Y

Rank	Risk Description	Risk Owner	Key Risk Management Activities / Mitigation	Opportunity / Lessons Learned
High 🟠	First large deployment DG3 and repeatable approach	Christy Campbell, ctcLink PMO	This will be the largest deployment group for our project to engage with and manage. We plan to monitor our approach so it is repeatable for future deployment groups.	DG3 lessons learned will be critical for how we plan for future colleges.
High 🟠	Security Redesign – Delayed from vendor; expected in February or March 2019.	Johnathan Rider, SBCTC Systems & Infrastructure Services Manager	A Security Framework will be built to allow for college understanding and application of PeopleSoft Security. Colleges will need adequate time to review, assign users to roles and test their user security roles.	College user security must be adopted, assigned, tested prior to user acceptance testing for easier transition at Go-Live.
Moderate 🟡	OCM: Business transformation – Most critical for Finance department is user adoption of the new Chart of Accounts (COA).	Emmett Folk, Finance SMEs (Subject Matter Experts)	In November 2018, the FIN Team developed and provided Finance SMEs (specially for Tacoma CC and Spokane District) with documentation and workshops regarding the new Chart of Accounts re-design. This information is instrumental in helping SMEs adopt the new Chart of Accounts and its associated business processes.	Early adoption of the new Chart of Accounts will provide for a smoother business process transformation before and after implementation of the upgrade for FirstLink Colleges.
Moderate 🟡	College Resources – Constraints and burnout	College Project Managers	Continue to monitor SMEs ability to perform and balance their day-to-day job duties/responsibilities while also engaging in ctcLink project activities.	College lessons learned to help each other limit resource constraints and burnout will be informative for future deployments.
Low 🟢	ctcLink team – Resources	Dennis Colgan, ctcLink PM for Procurement & Resources	For the past six months, ctcLink has re-structured team members and has hired consultants and new team members to be adequately staffed. In the future, there is concern for team resource transitions due to long project duration.	ctcLink will continue to assess and monitor team resources.

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LEGEND: 🔴 Critical 🟠 High 🟡 Moderate 🟢 Low

ctcLink Quality Assurance Scorecard
Moran Technology Consulting | November 2018

Overall: Y

RISK STATUS	PROJECT AREA	DESCRIPTION/NOTES
G	SBCTC/Governance	Governance framework continues to work as expected.
G	Program Management	Project Management Office (PMO) is fully staffed. Morale good.
Y	Phase Scope	QA concerned about implementation schedules for replacement solutions. Will know more once solutions are selected.
Y	Schedule Status	QA concerns re: overlap of schedules and resource constraints.
Y	Testing	New automated testing software will add value/benefit, but requires resources up front.
Y	Training	Development behind schedule. PMO is taking appropriate actions to recover the schedule.
G	Configurations/Data Conversion	The new standard Chart of Accounts has been configured and vetted with system-wide finance groups.
G	Organizational Change Management (OCM)	OCM is actively engaged in multiple areas, all focused on getting DG2 and DG3 colleges ready for deployment.
G	Project Staffing	Staffing is good. Overlap of Deployment Groups 2 and 3 may require additional resources.
G	Technical Environment	SBCTC continues to monitor system performance but there have been no outages since early September 2018.

LEGEND	GREEN	YELLOW	RED
Risk Description	Low risks may be encountered. NO immediate action needed	Moderate risks may be encountered. Serious deficiency and action item recommended.	High risks may be encountered. Needs to be escalated and can impact project effort or cost.

1/10/2019

WA State Office of the Chief Information Officer (OCIO) Oversight			Overall:	Y

		OCIO's Conditions to new ctcLink Investment Plan Approval	Status
G	1	Project must remain in-line with SBCTC and OCIO policies	Complete
G	2	QA (Moran) to report to ctcLink executive sponsor and State CIO	Complete
G	3	Follow pre-determined OFM funding gates and approvals	Complete
G	4	Monthly status reporting	Complete
G	5	Continue reporting on Remediation items in Integrated Work Plan	Complete
Y	6	OCIO approval of the 3 remediation solutions: Budgeting tool, Continuing Education Application, Online Admissions Application	In Progress
G	7	OCIO must be notified prior to use of contingency funds	N/A
Y	8	Perform a post-implementation review (lessons learned) after each deployment and post on the OCIO dashboard within 30 days of go-live	Planned as Activities in Project Work Plans
G	9	Process and timeline for filling the SBCTC CIO position by 1/31/2018	Complete

Note: New ctcLink Investment Plan approved by OCIO, with above conditions, on Jan. 19, 2018.

PILOT REMEDIATION OVERVIEW & STATUS

Date	Total Open Items	Open Items With a Plan to Complete (Appendix A)	Open Items Needing a Replacement Solution (Appendix A)	Open Items That Were Closed, but Reopened in Remediation Agreement (Appendix B)
		• 2016, 2017, 2018 Financial Books • Security Role Redesign • Absence Management • DRS Redistribution • Faculty Workload • Student Invoice & Third-Party Billing	• Continuing Education • Online Admissions • Budget Planning	• Financial Aid Customizations
11/29/17	195	101	10	84
12/13/18	41	29	10	2

ctcLink Replacement Solutions – Status as of December 2018

Solution	Status	RFP Publish	Solution Decision
Continuing Education	• RFP was developed and approved by Governance • RFP proposals due November 15, 2018 • 3 Vendors responded and subgroup is evaluating solution • Vendor demos scheduled for December 19, 2018 • Solution presented to Governance for approval in January	10/15/18	January 2019
Online Admissions Application	• Sub-Committee finalized OAA requirements • Project Team performed Fit/Gap of ctcLink functionality • OAA workgroup evaluated select solutions currently in use at other PeopleSoft Universities and Colleges • OAA workgroup developing a short list of best/possible solutions to identify those solutions • If needed, develop RFP	TBD	January 2019
Budget Planning	• Committee to be formed to review, finalize and approve Budgeting requirements • Review requirements against Oracle PBCS Solution • If needed, develop RFP	TBD	February 2019
Physical Inventory (Asset Tracking)	• Vendor Solutions being evaluated • New PeopleSoft functionality that will provide integration for asset tracking scanners directly with ctcLink	5/21/18	Delayed to evaluate new functionality in PeopleSoft

QUESTIONS?