



# Monthly IV&V Report



June 2024



plante moran

Audit. Tax. Consulting.  
Wealth Management.

100 years



# What We Did



## Conducted Interviews

- Created Interview Guides for subject areas (PM, FIN, HRM, and Tech)
- Conducted 28 interviews with Team Leads and OPM
- Compiled comments in Observations and Recommendations

## Participated in Meetings

- Attended onsite planning sessions
- Conducted planning sessions with NV and Plante Moran staff
- Compiled comments in Observations & Recommendations

## Reviewed Materials

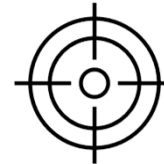
- Reviewed contracts, SOW, change requests, budgets and deliverables
- Compiled comments in Observations and Recommendations

## Developed an IV&V Plan

- Prepared our approach, tools, and templates to be used for the IV&V activities
- Delivered IV&V Plan to NV



# Overall Program Status



Target go-live  
Phase 1A Jan '25



Overall Program Status	
Scope	<ul style="list-style-type: none"> <li>Minimum Viable Product (MVP) was not defined and socialized.</li> <li>MVP continues to be challenged.</li> <li>Business Transformation scope is not defined and planned for phase 2.</li> </ul>
Schedule	<ul style="list-style-type: none"> <li>Lack of a Project Plan tied to resources and completion % of work does not give confidence and insight into the project schedule.</li> <li>OPM is putting metrics in place that will allow the ability to predict upcoming activities, but the plan should be correlated.</li> </ul>
Budget	<ul style="list-style-type: none"> <li>The budget for the 3<sup>rd</sup> parties in scope appears to align with the plan.</li> <li>Budget increase of \$1.7M approved for BerryDunn expansion and extension.</li> <li>Note: The budget for Nevada State project resources is not in scope and is being tracked by the State.</li> </ul>
Quality	<ul style="list-style-type: none"> <li>Use of the RAID Logs should be more robust and emerging Risks and Issues should be identified early for socialization with project stakeholders.</li> </ul>
Resources	<ul style="list-style-type: none"> <li>Multiple workstreams identified issues where tasks were significantly understaffed.</li> <li>OPM is reacting to fill roles.</li> </ul>
Overall	<ul style="list-style-type: none"> <li>The overall project is positive, but better insight from a project plan with resources, schedules, and timelines would provide better visibility to all project stakeholders.</li> <li>The OPM has been vigilant in reacting to risks and issues as they are known but should continue to improve the RAID process to capture information earlier.</li> </ul>



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# Contracts and Budgets Deliverables

**CELEBRATE THE JOURNEY**  
1998: Named for the first time to Fortune magazine's list of "100 Best Companies to Work For."

1996: Plante Moran Financial Advisors registers with the SEC

1996: Plante Moran CHESA is formed.

1995: Member of world's leading "1000" list of "1000 Most Influential Executives" in the U.S.

1996: PSM Corporate Finance LLC (PACF) is founded.

1995: Firm creates domain and later launches website.



2003: Firm forms Diversity Council.



2003: First international office in Shanghai, China.

2002: Firm is chosen by the U.S. Department of Treasury to help investigate the Enron collapse; Plante Moran Trust is created.

2011: Plante & Moran drops the "&"; becomes Plante Moran.

2012: First-Ever Global Workplace Recognition with International Accounting Bulletin's Employer of the Year award.



# Assessment of Contract Documents



## CGI Technologies

### » Contract Highlights

- ❑ Covers Financial and Human Resource systems SaaS, including:
  - ❑ Phase 1A MVP FIN
  - ❑ Phase 1B MVP HRM including Payroll
  - ❑ Phase 2A FIN Business Transformation
  - ❑ Phase 2B HRM Business Transformation
- ❑ Supporting current CGI Advantage 2 environment

### » Contract

- ❑ Initial contract executed Sep '23
- ❑ Value \$90,225,000
- ❑ Contracted term thru Sep'28

### » Contract Amendments

- ❑ Multiple contract amendments but only 2 (CR#9 and CR#8) affected \$,
- ❑ CR#8 earmarked \$2.5M for training at \$80,645 monthly from Mar '24 to Sep '26
- ❑ CR#9 deferred \$125k from FY24 to FY25.

### » Risks

- ❑ Contracted dates for Phase 2 may be extended and the ability to complete within the budget is a risk.



# Assessment of Contract Documents



## BerryDunn

### » Contract Highlights

- ❑ Overall project management support
- ❑ BerryDunn will lead and coordinate all State project activities
- ❑ Program Managers for FIN and HRM; not Technical

### » Contract

- ❑ Initial contract executed Feb '24.
- ❑ Value \$771,896.
- ❑ Contract term
  - ❑ June '24
  - ❑ Extension for an additional 27 months

### » Contract Amendments

- ❑ Amendment #1 for \$2,552,078 thru Mar '25 approved 6/11/24.
- ❑ Amendment #2 adds a role (IT PM) without cost impact.

### » Risks

- ❑ Project continuity risk. The period extended does not cover HRM go-live or Phase 2 go-lives.
- ❑ Note: Amendment 3 is expected to be submitted by early 2025 to extend the BerryDunn contract through the life of the CGI Contract.

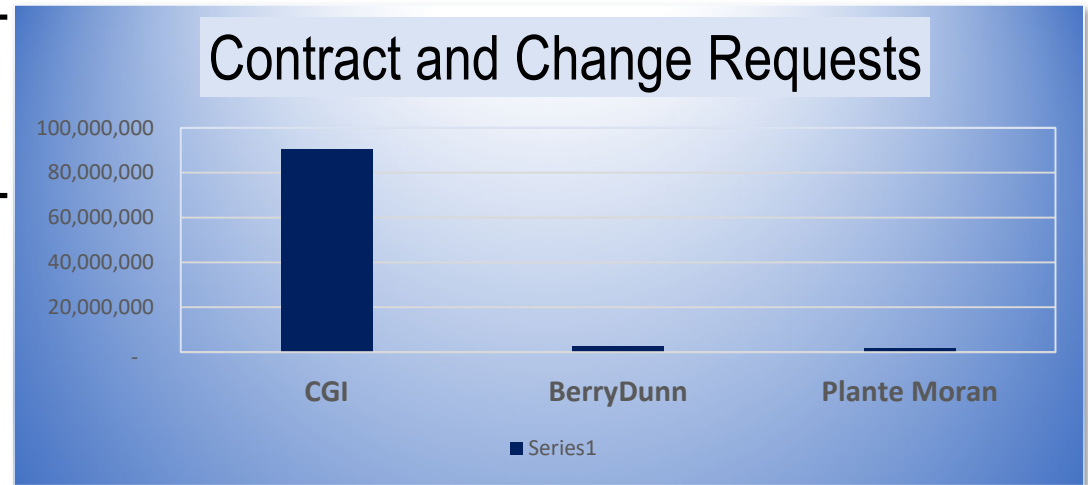


# Change Requests



Change Requests and changes to scope – include core decision papers and process changes

	CGI	BerryDunn	Plante Moran
Contract	\$90,225,000	\$771,896	\$1,833,000
CR / Amend		\$1,780,185	
<b>Total</b>	<b>\$90,225,000</b>	<b>\$2,552,081</b>	<b>\$1,833,000</b>



- **COA structure (Issue):** COA restructuring will occur in phase 2. Planning phase 2 with this in mind is necessary to determine activities, resources and timeline impacts.
- **NDOT business process pilot (Issue):** The NDOT pilot project to map business processes posed a risk if discoveries requiring significant effort were incorporated into MVP, in addition to the project resource diversion to the Pilot Project. Recently, it decided not to pursue this effort for MVP Phase 1, which allows project resources to continue their focus on Phase 1. This activity is necessary for phase 2, and planning for phase 2 needs to begin to determine activities, resources and timeline impacts.
- **Agency business process documentation (Issue):** NDOT and the other key agencies business process design for phase 2 must be part of phase 2 planning. The State should consider a separate effort and project to create a team to drive this important initiative to a timely completion as part of the phase 2 plan.





# CGI Budget FY24



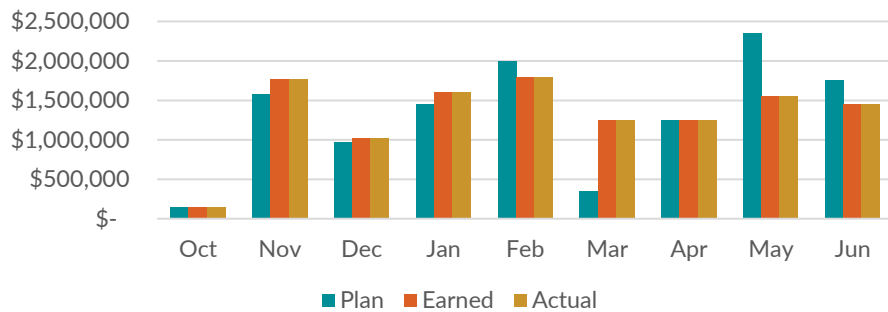
## Excluding Software & Change Control

Month	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Plan	\$150,000	\$1,575,000	\$975,000	\$1,450,000	\$2,000,000	\$350,000	\$1,250,000	\$2,350,000	\$1,750,000	\$ 11,850,000
Earned	\$150,000	\$1,775,000	\$1,025,000	\$1,600,000	\$1,800,000	\$1,250,000	\$1,250,000	\$1,550,000	\$1,450,000	\$ 11,850,000
Actual	\$ 50,000	\$1,775,000	\$1,025,000	\$1,600,000	\$1,800,000	\$1,250,000	\$1,250,000	\$1,550,000	\$1,450,000	\$ 11,850,000

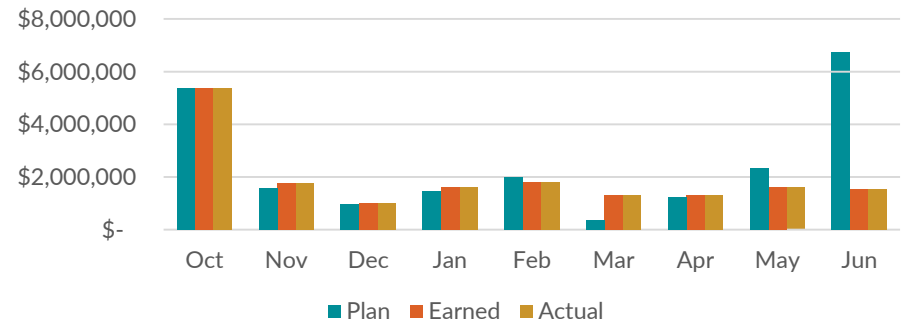
## Including Software & Change Control

Month	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Plan	\$5,385,000	\$1,575,000	\$975,000	\$1,450,000	\$2,000,000	\$350,000	\$1,250,000	\$2,350,000	\$6,750,000	\$ 22,085,000
Earned	\$5,385,000	\$1,775,000	\$1,025,000	\$1,600,000	\$1,800,000	\$1,330,645	\$1,330,645	\$1,630,645	\$1,530,645	\$ 17,407,580
Actual	\$5,385,000	\$1,775,000	\$1,025,000	\$1,600,000	\$1,800,000	\$1,330,645	\$1,330,645	\$1,630,645	\$1,380,645	\$ 17,407,580

Earned Value by Month excluding Change Control and Software



Earned Value by Month Including Change Control and Software \*



\* Note: of the \$5Min Change Control budget (plan) for FY 2024, \$322,580 was spent (CR#8). Roll forward the variance (\$5M-\$323k) and update the project budget documents.



# BerryDunn and Plante Moran Budget FY24



## BerryDunn

Month	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Plan					\$57,870	\$192,974	\$192,974	\$ 192,974	\$135,105	\$771,896
Earned					\$57,870	\$181,264	\$175,971	\$ 161,085		\$576,189
Actual					\$57,870	\$181,264	\$175,971	\$ 161,085		\$576,189

- Contract term February to June 2024
- Contract value of \$771,896
- Amendment 1 revised on 5/30/24 increased contract to \$2,552,081 through March 25
- FY25 Budget of \$1,780,185

## Plante Moran

Month	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Plan									\$91,000	\$91,000
Earned										
Actual										

- Plante Moran IV&V plan delivered in July
- Initial invoice of \$91,000 delivered with plan
- Tracking FY25 invoicing to overall plan; months will vary based on activity



# Combined 3 Partners Budget FY24



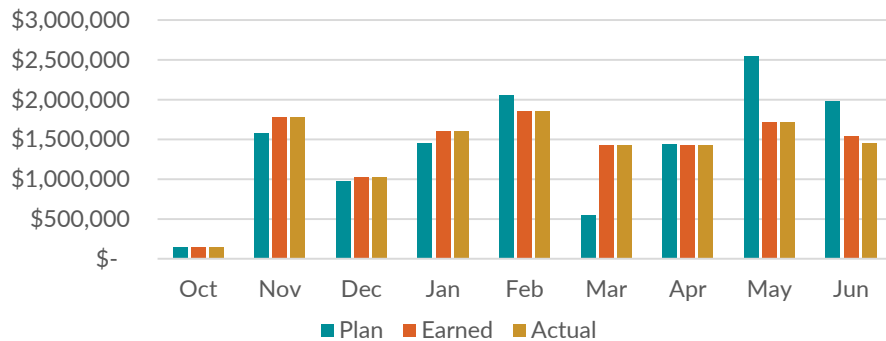
## Excluding Software & Change Control

Month	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
<b>Plan</b>	\$150,000	\$1,575,000	\$975,000	\$1,450,000	\$2,057,870	\$542,974	\$1,442,974	\$2,542,974	\$1,976,105	<b>\$12,712,896</b>
<b>Earned</b>	\$150,000	\$1,775,000	\$1,025,000	\$1,600,000	\$1,857,870	\$1,431,264	\$1,425,971	\$1,711,085	\$1,541,000	<b>\$12,517,189</b>
<b>Actual</b>	\$150,000	\$1,775,000	\$1,025,000	\$1,600,000	\$1,857,870	\$1,431,264	\$1,425,971	\$1,711,085	\$1,450,000	<b>\$12,426,189</b>

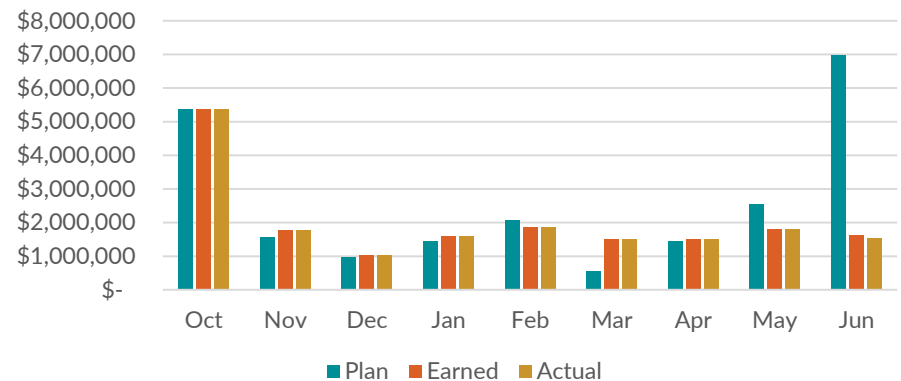
## Including Software & Change Control

Month	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
<b>Plan</b>	\$5,385,000	\$1,575,000	\$975,000	\$1,450,000	\$2,057,870	\$542,974	\$1,442,974	\$2,542,974	\$6,976,105	<b>\$22,947,896</b>
<b>Earned</b>	\$5,385,000	\$1,775,000	\$1,025,000	\$1,600,000	\$1,857,870	\$1,511,909	\$1,506,616	\$1,791,730	\$1,621,645	<b>\$18,074,769</b>
<b>Actual</b>	\$5,385,000	\$1,775,000	\$1,025,000	\$1,600,000	\$1,857,870	\$1,511,909	\$1,506,616	\$1,791,730	\$1,530,645	<b>\$17,983,769</b>

Combined Earned Value by Month excluding Change Control and Software



Combined Earned Value by Month Including Change Control and Software \*



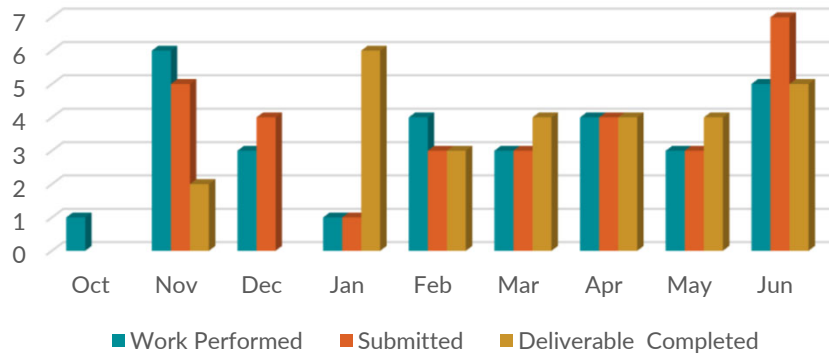


# Deliverables



Entity	Action	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
CGI	Work Performed	1	6	3	1	4	3	4	3	5	30
CGI	Submitted		5	4	1	3	3	4	3	7	30
CGI	Deliverable Completed		2		6	3	4	4	4	5	28
Berry Dunn	Work Performed					1	1	1	1	1	5
Berry Dunn	Submitted						1	1	1	1	4
Berry Dunn	Deliverable Completed						1	1	1	1	4
Plante Moran	Work Performed									1	1
Plante Moran	Submitted										0
Plante Moran	Deliverable Completed										0

CGI  
Month Work Performed, Submitted & Deliverable Completed





# Contract / Budget Observation & Recommendation



53	<p><b>Contract alignment to schedule (Issue)</b> The contract for BerryDunn does not cover all phases of the project implementation.</p>	<ul style="list-style-type: none"> <li>Project schedule must continue to be assessed, monitored, and re-baselined to align contracted resources and costs. This includes preparing new phase schedules at least 3 months in advance of the phase start.</li> <li>In advance of the contract expiration, sufficient time should be given to evaluate next steps with the contractor, including the review of contract resources against future phase schedules.</li> <li>Evaluate the timing, knowledge transfer, and ability to transition to State resourcing throughout the project.</li> </ul>	M	H
54	<p><b>Increase Scope and Timeline (Risk)</b> The current CGI contract may not be sufficient to implement Advantage 4.</p>	<p>Close monitoring of the scope and timeline for the MVP and future phases. Future phase plans need to be created and monitored at least 3 months prior to a new phase beginning.</p>	M	H
56	<p><b>Change Control Budget (Action Item)</b> Overall, the project is tracking very close to Plan. 25% of Change Control earmarked from training (CR#8) through Sep '26.</p>	<p>Roll forward the Change Control variance (\$5M-\$323k) to FY25 and update the project budget documents.</p>	M	M



# Schedule



# Schedule/Resources observations and recommendations



27	<p><b>Schedule timeline accurately reflected in the project plan (Issue)</b> The project plan lacks the activities and resources necessary to monitor progress.</p> <ul style="list-style-type: none"> <li>The project plan does not track activity, resources, and duration and % complete.</li> <li>The detail in Jira is not aligned to the overall project plan.</li> </ul>	<ul style="list-style-type: none"> <li>Build out a Project Plan that reflects the project activities and milestones to align to resources for all phases through go live. Jira can still hold the detail sprint tasks</li> <li>Computation of Earned value (EV) is performed on Deliverables as a proxy.</li> </ul>	H	H
57	<p><b>Agency SME's (Issue)</b> Bringing in agency staff for SME augmentation for short periods may not be sufficient.</p>	<ul style="list-style-type: none"> <li>Monitor agency SME staff against the plan and outcomes.</li> <li>Note: OPM is actively monitoring and addressing resource gaps.</li> </ul>	M	M
14	<p><b>OCM Resources (Issue)</b> OCM resources for the OCM workstream from the State is insufficient.</p>	<ul style="list-style-type: none"> <li>Dedicate additional internal state resources to support the OCM manager.</li> </ul>	H	H
21	<p><b>Technical Resources (Issue)</b> Technical resources are not sufficient to support the interface and warehouse workload.</p>	<ul style="list-style-type: none"> <li>Technical resources to address warehouse and interfaces workload is being addressed by the State.</li> </ul>	H	H



# Schedule/Timeline observations and recommendations



26	<b>Training Resources (Issue)</b> The FIN team did not plan to dedicate resources to training.	Training resources is being addressed by CGI through CR#8.	M	H
2	<b>Assign staff to Advantage 2 support (Issue)</b> Challenges with Advantage 2 failures are impacting critical resources needed for phase 1.	<ul style="list-style-type: none"> <li>Backfill project staff resources to free up Advantage 2 knowledgeable resources</li> <li>Resources for supporting Advantage 2 have been identified and issue is being mitigated.</li> </ul>	H	H
31	<b>Lack of project calendar (Issue)</b> The project does not have a centralized project calendar for all project meetings and events.	A project calendar tracking all project meetings and events should be created and socialized.	H	M
55	<b>Lack of plan for phase 2 (Risk)</b> The project team does not have a project plan for phase 2.	A project plan for phase 2 needs to be developed and socialized to support the transition from MVP to phase 2 activities.	H	H





RAID



# RAID Approach



<b>Risk Log</b>	Risks are events that may occur over the course of the project that could have adverse or detrimental effect on overall success
<b>Action Log</b>	Actions are the things that need to be done throughout the duration of the project and should be communicated to stakeholders
<b>Issue Log</b>	An issue is an unexpected event happening in the present moment with a potential negative impact on reaching goals
<b>Decision Log</b>	Decisions that need to be made over the course of the project should be communicated with stakeholders and memorized

<b>L = Low</b>	Item is less important at this time
<b>M = Medium</b>	Item is usually necessary but are not the most important item at present
<b>H = High</b>	Items is critical to address currently

<b>L = Low</b>	Item will not materially affect the usability of the system
<b>M = Medium</b>	Item may impact some portion of the usability of the system but not the overall ability to go live
<b>H = High</b>	Item may impact the ability to go live if not mitigated



# Key RAID items since last report



- RAID items will be trended and highlighted for changes in future reports
- Each RAID area has been addressed separately in the following slides
- The chart below shows the RAID items based on the project and the IV&V observations

- \* Project Action Items – 58 total recorded with 4 still open
- \*\* IV&V Decisions – IV&V not making decisions, but many action items can be considered decisions when adjudicated



RAID

Risks

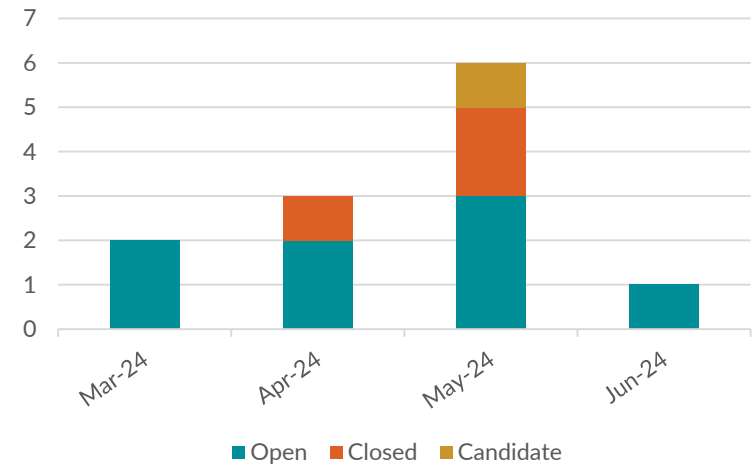


# Risk Summary

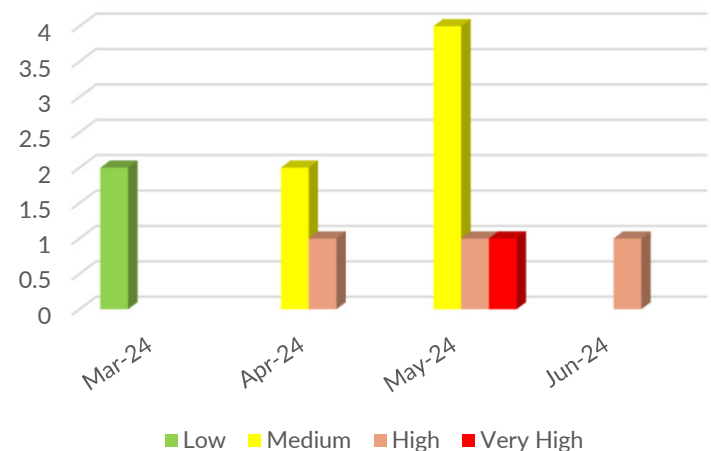


- There are twelve records on the Project Risk Log. The number is low based on the size and complexity of the implementation.
- The OPM recently created a framework around the identification and management of RAID and is vigorously reviewing RAID weekly.
- IV&V has identified 5 Risks in the following slides.

Risk Log - Entered Date



Risk Log - Impacts





# Risk Log Summary



*Details in following slides*

54	Contract	Current CGI contract may not be sufficient to implement Advantage 4	<ul style="list-style-type: none"> <li>Close monitoring of the scope and timeline for the MVP and future phases.</li> </ul>	M	H
10	Project Management	Insufficient use of Risk and Issue log	<ul style="list-style-type: none"> <li>Train, encourage, and reward open discussion and recording of risks.</li> </ul>	H	H
50	Project Management	Lack of phase 2 plan	<ul style="list-style-type: none"> <li>Plan for the support of phase 1 after it goes live and develop with the plan for phase 2.</li> </ul>	H	H
51	Project Management	Upcoming elections	<ul style="list-style-type: none"> <li>Complete legislative report and update communications plan.</li> </ul>	M	H
48	Schedule	Lack of contingency plan	<ul style="list-style-type: none"> <li>Leadership should drive a contingency plan of missing the project schedule.</li> </ul>	M	H



# Risks (1)



54	Current CGI contract may not be sufficient to implement Advantage 4	Close monitoring of the scope and timeline for the MVP and future phases. Future phase plans need to be created and monitored at least 3 months prior to a new phase beginning.	M	H
10	Insufficient use of Risk and Issue log	<ul style="list-style-type: none"> <li>Although there is a process that has been recently defined, staff should be socialized on the definition, process of identification, and the recording of risks.</li> <li>Leadership should encourage and reward open discussion and recording of risks.</li> <li>Hold a meeting with Team Leads to train on definitions of Risk and use of the Risk Log. Once these meetings are complete, regular focus and monitoring of risks should continue.</li> </ul>	H	H
50	Lack of phase 2 plan following the initial MVP for the future phases has not been developed.	Create a plan for the rollout and support of phase 1 MVP for FIN, continue phase 1 MVP for HRM and align with the plan for phase 2 to assess resource and schedule conflicts.	H	H



## Risks (2)



51	<b>Upcoming election (Risk)</b> Upcoming elections in November may impact project leadership and the project.	<ul style="list-style-type: none"><li>• Complete the legislative reports and messaging to the legislative body.</li><li>• Monitor the impact to leadership positions and update communication campaign.</li></ul>	M	H
48	<b>Lack of a contingency plan (Risk)</b> for the schedule for both Financial and HRM MVP.	<ul style="list-style-type: none"><li>• Suggest leadership determines the contingency of missing schedule.</li><li>• This includes a defined GO-NO GO decision plan.</li></ul>	M	H





RAID

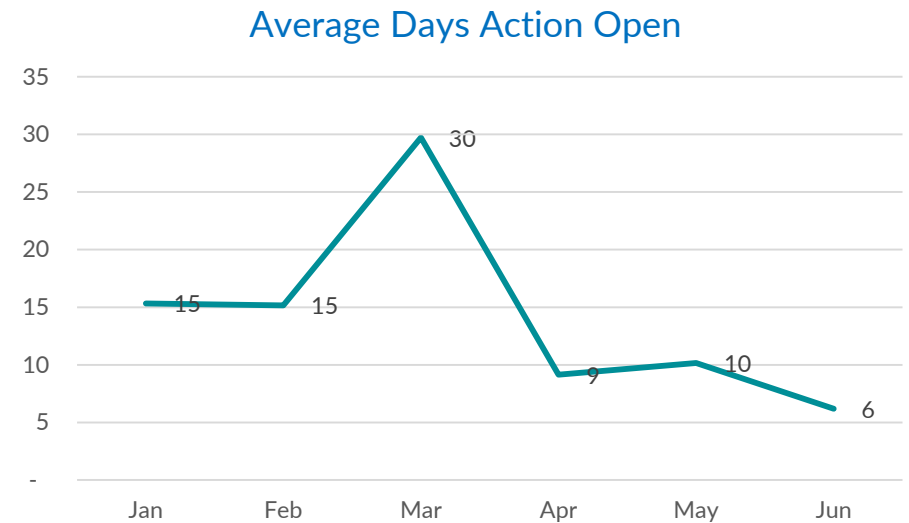
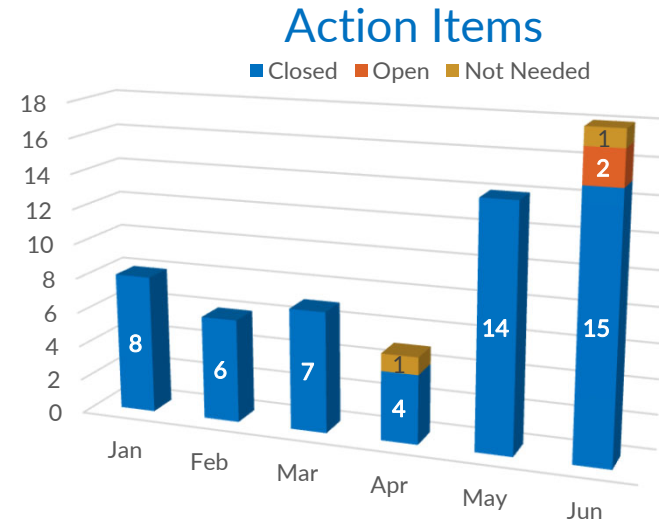
Actions



# Actions Summary



- OPM has 58 Action Log entries recorded by Project to date; 4 open.
- Activity increased in May and June
- Days open have diminished significantly as items are addressed promptly
- IV&V has identified 11 Action Items in the following slides.





# Action Log Summary (1)



Details in following slides

1	Project Management	FIN, HRM, and technical teams' cohesion can be improved	NV OCM should work with other teams to duplicate their success.	M	H
2	Project Management	Individual team members feel they are not heard	The use of the risk/issue and decision logs can provide transparency and can help individuals feel heard (create culture).	H	M
12	Project Management	Resource schedule roll-on & roll-off not visible to team	Staff roll-on/off schedule should be visible to team.	M	M
25	Project Management	NV development of test scripts during test phase may impact time available	CGI assistance for test script creation.	H	H
40	Project Management	Q2 and Q3 legislative reports are lagging	Identify alternative resources who can assist.	H	H
56	Project Management	Overall, the project is tracking very close to Plan.	Roll forward Change Control budget.	H	H
34	Finance	Configuration of cost accounting and fixed assets are lagging (P2=>P4)	Identify agency resources to assist and prioritize in backlog.	H	H



# Action Log Summary (2)



*Details in following slides*

35	Finance	COA crosswalk does not show the actual length of characters	Update crosswalk with actual character length.	M	H
33	HCM	Positive pay change will create additional scope and effort	Non-MVP changes in current practice should be minimized.	H	H
11	OCM	Enhance project communication	Change agent network (CAN) team should be used to provide additional support for communicating.	M	M
24	OCM	Lack of a definitive list of training participants	Develop a list with the team and agencies.	L	H



# Action Items (1)



1	<b>FIN, HRM, and Technical teams' cohesion can be improved</b>	Cohesion on the OCM team is high, especially considering the number of external resources involved in the project and the high degree of turnover on other teams. Work with OCM Lead to see what could be duplicated across other teams	M	H
2	<b>Individual team members feel they are not heard as much as team leadership.</b>	<ul style="list-style-type: none"><li>• Listen for the contribution of individuals who may not be leaders in title but can still provide insightful information.</li><li>• The robust use of the Risk/Issue and Decision Logs can provide more transparency and will frequently help members feel heard as their concerns are discussed in the weekly meetings.</li></ul>	H	M
12	<b>Resource schedule roll-on and roll-off not visible to team.</b> Identification of Project team members is not well socialized and documented. Not having a clear understanding of project resourcing may impact morale and the ability to meet deadlines.	A consolidated Team roster with planned and actual roll-on and roll-off dates should be maintained to document and socialize project staffing. This will also provide leadership insight into staff changes and plans for all staff working on the project.	M	M



# Action Items (2)



25	<b>The State is responsible for write its own test scripts, which will likely cause a significant distraction from building/testing/training.</b>	Consider using CGI to assist. Then, take the time to review/edit as appropriate.	H	H
40	<b>Quarterly Legislative Reports delivery is lagging..</b>	Identify alternative resources who can assist in reviewing the Legislative Reports and maintain them on a current basis.	H	H
56	<b>Overall, the project is tracking very close to budget plan. 25% of Change Control earmarked from training (CR#8) through Sep '26.</b>	Roll forward the Change Control variance (\$5M-\$323k) to FY25 and update the project budget documents.	H	H



# Action Items (3)



34	<b>Configuration of cost accounting and fixed assets are lagging (P2=&gt;P4)</b>	<ul style="list-style-type: none"> <li>Identify stakeholder agency resources available to support the related tasks to make sure they are completed timely.</li> <li>These functionalities are critical for certain departments and assessment of the downline impact on task completion should be closely monitored.</li> </ul>	H	H
35	<b>COA Crosswalk</b> As of our time on site, we understood the plan and procedure for cross walking the Chart of Accounts from Advantage 2 to Advantage 4 had been decided. Upon further review of the actual mapping, we are unsure of the process that was used to map the fields in the crosswalk.	<ul style="list-style-type: none"> <li>The Chart of Accounts crosswalk from Advantage 2 to Advantage 4 should be reviewed to determine all elements are mapped appropriately.</li> <li>Update the crosswalk with the actual Advantage 4 element number of characters. The crosswalk indicated for most elements in Advantage 4, the maximum is 4. Several of the Advantage 2 elements are less than 4.</li> </ul>	M	H
33	<b>The move to Positive Pay</b> (exempt staff entering time) will require all State staff to enter time in the new system, regardless of whether or not they enter time today. This is a significant change from current practices and must be well-documented and communicated ahead of the change.	Minimize future requests for changes to MVP and put a process in place to quickly adjudicate requests.	H	H

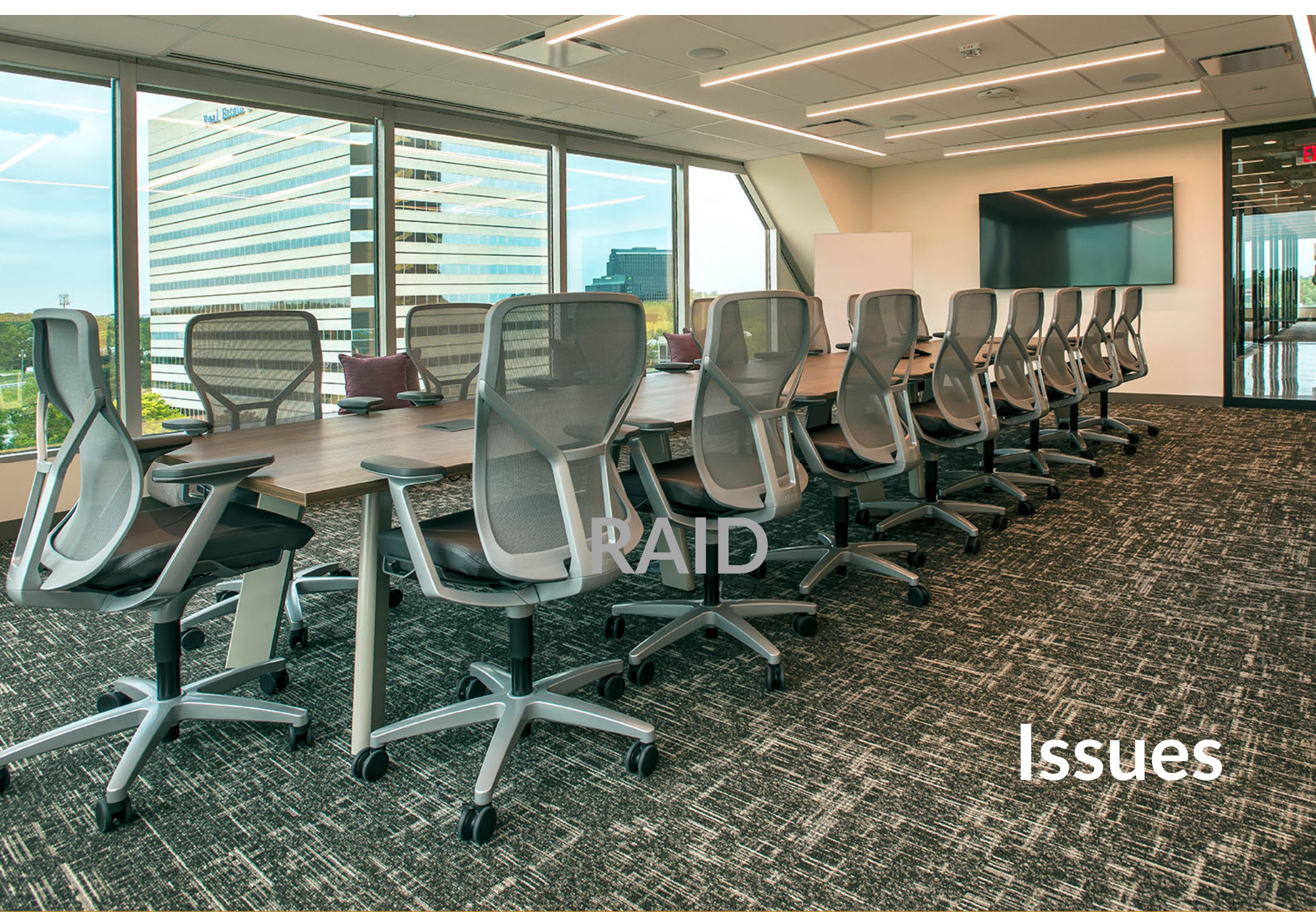


# Action Items (4)



11	Additional support for communicating to Agencies would be valuable.	Include CAN as a central messaging channel when communicating to impacted departments or Agencies.	M	M
24	Lack of a definitive list of training participants	Develop a list with the team and agencies.	L	H





RAID

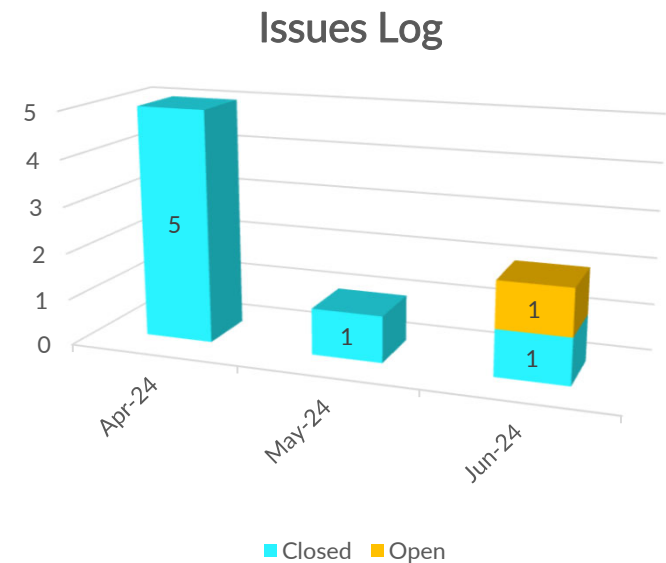
Issues



# Issue Summary



- OPM has identified 9 Issues to date and 2 are active on the project. The number appears low based on the size and complexity of the implementation.
- IV&V has identified 42 Issues in the following slides.





# Issue Log Summary (1)



#	Functional Category	Observation	Recommendation	Priority	Severity
3	Project Management	Onboarding of staff is not consistent.	Develop process onboarding of staff.	H	H
4	Project Management	Action log is underutilized.	Develop plan and train on the use of the action log.	H	H
5	Project Management	Jira is not being used consistently.	Provide access and train staff.	H	H
6	Project Management	Metrics are not being gathered consistently.	Develop actionable metrics.	H	H
8	Project Management	The decision log is underutilized.	Communicate and train staff.	M	H
16	Project Management	Upgrades to legacy systems can impact conversion and interface efforts.	Upgrades should be managed and scheduled with a calendar for cessation of upgrades communicated to affected agencies.	H	H
18	Project Management	Technical teams have separate management.	Establish a dedicated single IT PM role.	H	H
19	Project Management	Long work weeks adversely impact employee morale and productivity.	Recognize, support, and reward employees.	M	H



# Issue Log Summary (2)



#	Functional Category	Observation	Recommendation	Priority	Severity
27	Project Management	The project plan and Jira are not synced.	Consistently correlate the two project plans and tracking of activities.	H	H
28	Project Management	The project plan does not reflect current activity and plans.	Update the project plan to reflect activity tracked in Jira.	H	H
29	Project Management	The definition and management of "backlog" is inconsistent.	Develop a quick "guide to backlog" and train.	H	H
30	Project Management	Overall project plan does not depict inception through go-live.	Create a plan to encompass full timeline through phase 2.	M	H
31	Project Management	There is no high-level project calendar.	Develop a high, level visible calendar.	M	M
32	Project Management	The definition of MVP (minimum viable project) is not clear.	Develop and socialize with all stakeholders.	H	H
36	Project Management	Agency providing feedback on conversion approach consumes resource time.	Communicate MVP to agencies.	H	H
44	Project Management	NDOT business process pilot.	Align pilot plan to limit impact on MVP resources, timeline and scope.	M	H



# Issue Log Summary (3)



#	Functional Category	Observation	Recommendation	Priority	Severity
45	Project Management	Additional business process discovery activities.	Align pilot plan to limit impact on MVP resources, timeline and scope.	M	H
37	Project Management	Scope challenges such as interfaces and forms from agencies (DHHS).	Communicate MVP repeatedly to agencies.	H	H
47	Project Management	Misalignment on project status reporting.	Align BerryDunn and CGI on project status and when not, explain differences.	H	H
49	Project Management	Lack of a log and related process to record scope items for phase 2	Create a log and maintain.	H	H
55	Project Management	Clarity on a project plan is needed for phase 2.	Updated project plan soon for Phase 2.	M	M
57	Project Management	Bringing in agency staff for SME augmentation for short periods may not be sufficient.	Monitor agency SME staff against the plan and outcomes.	M	H
59	Project Management	Interfaces and conversions are challenging the project resourcing and scheduling.	Monitor the impact of these two critical workstreams on other teams and tasks.	H	H



# Issue Log Summary (4)



#	Functional Category	Observation	Recommendation	Priority	Severity
53	Contract	Contract for BerryDunn does not cover all phases.	Assess schedule and contract expiration.	M	H
13	OCM	Project leadership changes.	Identify root causes and mitigate.	H	H
14	OCM	Additional support for the OCM workstream is needed.	Dedicate additional internal OCM resources to support the State's OCM Manager.	H	H
26	OCM	The Finance team did not have the resources for training.	Obtain resources from other agencies or 3rd parties.	H	H
9	Finance	Plan to update COA phase 1 was not achievable.	Raise risk earlier by team.	H	H
17	Finance	Finance team resourcing is not sufficient.	Identify dedicated project resources for the duration of the project need.	H	H
42	HCM	Current payroll system is fragile.	Identify if retired or external resources are available to support.	H	H



# Issue Log Summary (5)



#	Functional Category	Observation	Recommendation	Priority	Severity
7	Technical	There is no formal design sign-off with the development work by either CGI or OPM software.	Implement policy and procedure.	H	H
20	Technical	Nevada technical team lacks the knowledge of the system and tools.	Further training should be provided to the OPM technical team to increase their familiarity.	H	H
21	Technical	The NV technical team lacks resources to develop interfaces and reports.	Develop resource plan and present to EC.	H	H
22	Technical	Security role work is lagging.	FIN resources should be leading. Assess delay impact on UAT and training.	H	H
23	Technical	Single sign on (SSO) work needs to be coordinated.	Coordination between OPM, CGI and the state's OCIO is required to determine scope.	H	H
38	Technical	The future strategy & plan for the Advantage 2 data warehouses (DW) is not defined.	Develop a formal plan to address the continued use of the current data warehouses to support MVP and Phase 1a go-live.	H	H
39	Technical	The scope of required interfaces needed for MVP is not known.	Identify, prioritize, and design.	H	H



# Issue Log Summary (6)



#	Functional Category	Observation	Recommendation	Priority	Severity
41	Technical	The scope of work for required reports needed for MVP is unknown.	Discover, develop scope, and plan.	H	H
46	Technical	Advantage 2 system appears to lack disaster recovery.	Establish disaster recovery approach.	H	H
52	Technical	Testing should observe state PII requirements.	Review potential PII in designs, conversions, and integrations.	H	H
58	Technical	There is no State counterpart to CGI for Environment knowledge transfer.	Identify a State resource.	H	M
60	Technical	RAID process underutilized.	Use if RAID log should be more robust.	H	H





# Issues Log (1)



3	<b>Onboarding of staff is not consistent</b> and thorough and lacks standard materials and tools provided as needed to perform their responsibilities.	Consistent onboarding of staff will provide a unified message as to the project and teams, which should accelerate integration into the project. Additionally, tools and training required to complete tasks and jobs can be delivered on a consistent basis.	H	H
4	<b>Having 8 Action Items logged as of this date would not be reasonable</b> for a project of this complexity and size.	Note: this item is addressed in the lead-in slide for this section on Action Items.	H	H
5	<b>Jira is not being used consistently across the Project</b> due to the lack of understanding and access to the tool by all team members. There is not a consistent set of metrics used to track the project schedule, issues, and action items for visibility to the project leadership.	<ul style="list-style-type: none"> <li>Assess knowledge of the Jira tool with the project staff and provide training for those who can benefit.</li> <li>Access to Jira for all staff to update Jira directly to update tasks.</li> <li>Provide Team Leads with training on the standards and expectations for consistency in definitions, work, and reporting.</li> <li>Project management metrics from Jira need to be established to track progress of the team.</li> </ul>	H	H



# Issues Log (2)



6	<b>Metrics are not being gathered at a consistent level</b> , lack details of the actual progress for metrics on progress to measure capacity, and are not available to assist in reporting status and communications to stakeholders and the Project Team across the Project.	<ul style="list-style-type: none"> <li>Develop actionable metrics that are collectible from the existing data and can easily tell a story to stakeholders via trends and variances.</li> <li>All project management metrics need to be standardized across the project for managing all team actions, issues, activities and progress to the schedule.</li> </ul>	H	H
8	<b>There are 22 items on the Decision Log</b> of which all indicate "Done". Having 22 decisions logged as of this date is not be reasonable for a project of this complexity and size.	Continue to use the decision log for decisions that need or have been made on the project.	M	H
16	<b>The State OCIO and OPM will be doing upgrades</b> for the Nevada Project Accounting System (NPAS) and Contract Entry and Tracking System (CETS), an online application that runs in a web browser used for managing contract information.	<ul style="list-style-type: none"> <li>The State should identify any future upgrades and determine the necessity of implementation and plan for any impact on the Advantage 4 implementation.</li> <li>In projects of this complexity, a point in time is identified in the timeline whereby related systems, are not updated due to the downstream effects on the success of the project.</li> </ul>	H	H



# Issues Log (3)



18	<b>Technical teams have separate management (Issue)</b> This has created communication and coordination challenges related to the entire body of work undertaken by the project team.	Establish a dedicated IT project management role to guide and align the efforts of the OPM and CGI technical teams.	H	H
19	It was socialized during the Planning meetings that <b>staff will need to work 60-70 hours weekly to maintain progress</b> to the tight schedule. This schedule may adversely impact employee morale and productivity.	<ul style="list-style-type: none"> <li>Review State mechanisms to reward employees and provide incentives to lessen the impact on morale and productivity.</li> <li>Identify where resources can be backfilled if there are any competing job priorities.</li> <li>Identify where additional resources can be sourced to staff the project.</li> </ul>	M	H
27	<b>The Project Plan and Jira are not synced</b> , creating uncertainty and lack of 360-degree visibility into project progress and status.	Although the project is being managed in Jira, there should be a consistent correlation and updates to the Project Plan, where progress can be visible to all levels of stakeholders.	H	H
28	<b>The Project Plan is not updated</b> and does not reflect current activity and plans.	Update the Project Plan to reflect activity being tracked and accumulated in Jira, after Jira has been reviewed and updated.	H	H



# Issues Log (4)



29	The <b>definition and management of "backlog"</b> across project teams is not consistent and not all are not being included in reports. This leads to inadequate visibility into project activity and progress.	A project plan should be created that encompasses the full timeline through Go-live and the following business transformation phase.	H	H
30	<b>There is not an overall project plan that depicts the steps necessary from the beginning of the project through Go-live.</b> It is not possible to have an accurate view of all of the work necessary to ensure a successful and on-time implementation without a cradle-to-grave project plan.	A project plan should be created that encompasses the full timeline through Go-live and the following business transformation phase.	M	H
31	There is <b>no high-level project calendar</b> to provide top-down visibility to executives and other stakeholders to understand and plan for upcoming project activities and events.	Develop a high level, visible, calendar for all project members and executive stakeholders to allow for better planning and execution of scheduled events. This could be as simple as a shared project calendar in Outlook that is invited to all project wide meetings.	M	M



# Issues Log (5)



32	<p><b>The definition of MVP (Minimum Viable Project) is not clear to stakeholders.</b></p>	<ul style="list-style-type: none"> <li>The definition of MVP (Minimum Viable Project) needs to be definitive, socialized with the Project Team, and communicated to all State stakeholders.</li> <li>Separate definitions should be crafted for both the Finance and Human Resource Management stakeholders. The OCM Team should be developing the messages and executing communications of the message to stakeholders.</li> </ul>	H	H
36	<p><b>An agency has provided feedback on the Project's conversion approach</b> after the Project previously adopted a conversion strategy, which may impact the Project scope and schedule due to a potential "gap". The identification of "gaps" in MVP may indicate (1) a lack of understanding by agencies of Minimum Viable Product (MVP), (2) the ability of agencies to continue to provide input after the scope has been identified, or (3) discovery was incomplete.</p>	<ul style="list-style-type: none"> <li>The feedback from the agency should be quickly validated in the context of the defined MVP definition. If the feedback identifies gaps in the MVP that require changing the conversion approach, the impact should be brought to leadership for evaluation along with an impact analysis.</li> <li>Leadership and Project Management should continue to socialize and communicate the definition and importance of MVP throughout the agencies and continue to evaluate meaningful feedback on MVP when presented.</li> </ul>	H	H



# Issues Log (6)



44	<p><b>NDOT business process pilot (Issue)</b></p> <ul style="list-style-type: none"> <li>Identify and document business processes with the Nevada Department of Transportation (NDOT) within six weeks.</li> <li>The potential impact on MVP may be substantial due to additional requirements.</li> <li>The timeframe to complete is too short.</li> </ul>	<ul style="list-style-type: none"> <li>Develop a plan and assign a focused team to conduct this effort as part of the work in phase 2.</li> <li>Use the decision log process to fully document business design decisions</li> <li>Separate the business requirements as part of phase 2 only.</li> <li>Use this work to guide the full build out of phase 2 plan.</li> </ul>	M	H
45	<p><b>Additional business process discovery activities (Issue)</b></p> <p>Additional 14 State agencies should be part of the business process discovery activities to prepare for phase 2.</p>	<p><i>Note: The state has already put this work on pause.</i></p>		



# Issues Log (7)



37	A new interface and form, which was not on the current list of 85 interfaces required for MVP was identified by DHHS for generating and printing child support and welfare checks. This may require additional resources and effort from the project team which may or may not have the capacity to implement.	<ul style="list-style-type: none"> <li>CGI and the project team are scoping the interface and the form (check) to understand the impact on the Project. The OPM will also have discussions with the project and leadership on available alternatives that may be available to produce the checks. Update: A decision was made not to include checks in MVP, Phase 1.</li> <li>The OPM should communicate with all agencies to confirm they have identified all interfaces for MVP.</li> </ul>	H	H
47	Misalignment on project status reporting (Issue) between CGI and BerryDunn regarding the status of the project.	The BerryDunn and CGI team need to align on metrics, scope and schedule and report the status transparently to the ESC.	H	H
49	Lack of process to place scope items on a log for after MVP.	As scope items are defined, a log should be used to track and schedule items for Phase 2.	H	H



# Issues Log (8)



55	<b>Project Plan should be updated soon for Phase 2</b> , to identify resources, timeline and budget needed to complete, In January 2025 when MVP goes live, HRM is working toward MVP and Phase 2 overlap is beginning, and post go-live support is occurring.	Future phase plans need to be created and monitored at least 3 months prior to a new phase beginning. The schedule and related contracts point should be considered and synched.	M	M
57	<b>Bringing in agency staff for SME augmentation for short periods may not be sufficient.</b>	Align the project plan to resources and fill resources accordingly. Monitor agency SME staff against the plan and outcomes.	M	H
59	<b>Interfaces and conversions are challenging the project resourcing and scheduling.</b>	Interfaces and conversions require a high degree of data validation, testing and adequacy of technical and functional resources should be planned and monitored for these two critical workstreams.	H	H





# Issues Log (9)



53	The contract for BerryDunn does not cover all phases of the project implementation	<ul style="list-style-type: none"> <li>Project schedule must continue to be assessed, monitored, and re-baselined to align contracted resources and costs. This includes preparing new phase schedules at least 3 months in advance of the phase start.</li> <li>In advance of the contract expiration, sufficient time should be given to evaluate next steps with the contractor, including the review of contract resources against future phase schedules.</li> <li>Evaluate the timing, knowledge transfer, and ability to transition to State resourcing throughout the project.</li> </ul>	M	H
13	Project leadership changes Leadership changes have occurred. This is an indicator of burnout, unclear direction, understaffing, or other barriers.	Identify root causes for turnover which may include mismatched hires, overwhelmed staff, etc., and effectively address root causes.	H	H
14	The level of support for the OCM workstream from the State is insufficient, considering the size and potential impact of the change to business processes.	Dedicate additional internal OCM resources to support the State's OCM Manager. Where possible attach State resources to the project full time.	H	H



# Issues Log (10)



26	<b>The Financial team did not plan to dedicate resources to training</b> , since they have competing priorities and believed additional staff can be pulled in from other areas to support this effort.	Prioritize obtaining resources from other agencies or departments to support the Financial and the OCM teams to ensure end users are appropriately trained <i>Note: a change request has been executed to provide additional training resources to the State.</i>	H	H
9	<b>OPM raised a concern that they may not be able to complete the standardization of the COA in time for the January 1, 2025, go-live.</b> Three potential options were proposed and 1 was ultimately accepted by leadership.	<ul style="list-style-type: none"> <li>Logging of issues and tracking issues to completion is critical to all members on the project. Issues need to be openly discussed, assigned and tracked to resolution.</li> <li>The team needs to re-educate the team and leadership on what a risk and an issue is.</li> </ul>	H	H
17	<b>The Finance staff dedicated to the project are a total of three</b> , one being the Deputy Project Manager. While there are an additional five Subject Matter Experts (SME's) on loan from agencies, the two project specific resources are splitting the totality of Finance processes between them.	<ul style="list-style-type: none"> <li>The State should continue to use the SMEs but should allocate additional Finance staff to support the project.</li> <li>A State-level project needs dedicated resources for each primary business process within Finance, i.e., Accounts Payable, Accounts Receivable, Purchasing, Chart of Accounts and General Ledger, Projects, Grants, and Fixed Assets.</li> </ul>	M	H



# Issues Log (11)



42	<p>The current payroll system is fragile and continues to have failures. These failures require Project Team resources to be diverted to support the current payroll system (Advantage 2). This impacts the Project Team staff's ability to complete tasks timely on the Project.</p>	<ul style="list-style-type: none"> <li>Continue to discuss the various options available with continual identification of impacts to the ERP project resources, timeline, and budget.</li> <li>Identify if retired resources are available or other external support for Advantage 2, including CGI and other 3rd parties.</li> <li>Discuss and create a disaster recovery plan that can be deployed for failures. This should be high priority, documented, practiced and used as these failures occur.</li> <li>The OCIO and business owners of these critical systems should understand and work the disaster plan and procedures together until the new applications are replaced.</li> </ul>	H	H
7	<p>There is no formal design sign-off process associated with the work being completed by either the CGI or OPM software development resources.</p>	<p>A formal design approval process should be established for report, interface and conversion development. The formal design should also inform the IUAT process and associated test scenarios.</p>	H	H



# Issues Log (12)



20	<b>The Nevada interface development team lacks the adequate knowledge</b> of the system and tools associated with interface development.	Further training should be provided to the OPM technical team to increase their familiarity with Agile software development (including Jira) and the various tools used in the SDLC process (including Pentaho).	H	H
21	<b>The State's technical team lacks adequate personnel resources to address the interface</b> and report development needs of the project.	Technical resource planning should be completed to determine the required resources needed by the State to support the development. The resource should consider the current velocity of the team.	H	H
23	<b>Single-sign on is planned</b> for the Advantage 4 deployment, however validation of the scope of the state security domains and authentication mechanisms have not been validated with OCIO or CGI.	Coordination between OPM, CGI and the State's OCIO is required to determine the scope of the authentication requirements (e.g., domains, authentication protocols, etc.) and validation from CGI that Advantage 4 can satisfy requirements.	H	H



# Issues Log (13)



22	<p>The security roles are being migrated from Advantage 2 to Advantage 4 with minimal modification.</p> <ul style="list-style-type: none"> <li>• However, no validation or approval from the functional team has been completed to ensure the new roles provide the required level of access and adhere to the segregation of duties requirements.</li> <li>• The effort to discover, configure, and test Security Roles across the enterprise is significant.</li> </ul>	<ul style="list-style-type: none"> <li>• Develop an Advantage 4 security matrix for each of the roles being configured seeking validation and approval from the functional teams before performing role configuration. Identify which resources across the State agencies can assist with the effort.</li> <li>• The CGI PM has advised best practice is to use the same roles and permissions across the enterprise which is the standard approach for most ERP implementations.</li> <li>• Identify a State resource who will be a dedicated security and workflow. The role would include visioning on how security and roles will transition from Phase 1 to Phase 2 and to provide guidance on how best to achieve the optimum solution.</li> </ul>	H	H



# Issues Log (14)



38	<p><b>The future strategy for the Advantage 2 data warehouses (DW) is not defined.</b> The current approach is to maintain the existing warehouse to mitigate the need to migrate a significant number of reports to Advantage 4.</p>	<ul style="list-style-type: none"><li>• A strategy should be developed to quickly develop a formal plan to address the continued use of the current data warehouses to support MVP and Phase 1a go-live.</li><li>• It was discussed that the agencies (NDOT and Finance) should be responsible for implementing the warehouse solutions for MVP. If they are to be responsible, evaluation of their resources, knowledge, and timeframes should be considered for their impact on the project and incorporated into the project plan.</li></ul>	H	H
39	<p><b>The scope of required interfaces needed for MVP is not known.</b> Only approximately 20% of the known interfaces have been validated to determine their necessity for MVP. Progress is being made, however, clear design documentation to validate the interfaces will need to occur to make the necessary progress for MVP.</p>	<p>Identify the required interfaces needed for MVP Phase 1a and prioritize the development of the interface development with the PI's and related sprints. Document the designs to support the development and testing of the interfaces.</p>	H	H



# Issues Log (15)



41	The scope of required reports needed for <b>MVP is not known</b> . The current approach is focused on the migration of the reports that are directly generated using the Advantage 2 system.	Upon validation of the required reports for MVP, resource planning should be completed to determine the required resources needed by the state to support the development. The resource should consider the current velocity of the team.	H	H
46	The existing Advantage 2 system appears to <b>lack necessary disaster recovery</b> mechanisms to allow for the restoration of the system in the event of a threat or hazard that affects its operation.	<ul style="list-style-type: none"> <li>Immediate action should be taken to establish a disaster recovery approach for this system. Such approach should allow for the efficient and timely restoration of service in the event of a disaster or hazard.</li> <li>Given the legacy nature of the current Advantage 2 hardware and software, the State may need to seek external service providers who can offer DR services for this purpose.</li> </ul>	H	H
52	<b>PII information may be observed.</b>	Test planning should identify the various states and tables where PII data can be exposed and develop a plan on how to not expose the data. The plan should be reviewed by the State security team as well as the project stakeholders and team.	H	H



# Issues Log (16)



58	<p><b>There is no State counterpart for CGI Environment Lead for knowledge transfer.</b></p>	<ul style="list-style-type: none"> <li>• Environments appear to be in place for development, testing, and training but adequacy should be continually monitored when testing for Financial and HRM may overlap.</li> <li>• A State resource should be identified to be the counterpart to the CGI resource to obtain the knowledge transfer required for the State.</li> </ul>	H	M
60	<p><b>RAID Log (Process) Underutilized</b></p> <ul style="list-style-type: none"> <li>• RAID Logs need to be utilized, accessible, and socialized to all stakeholders.</li> <li>• RAID transparency with the staff and leadership as to the evaluation and impact of all log items identified need to be regularly communicated.</li> <li>• Leadership should encourage and reward open discussion and recording of risks and issues.</li> </ul>	<ul style="list-style-type: none"> <li>• Conduct a risk session to identify internal and external issues and risks known and create mitigation strategies for each.</li> <li>• Hold a training session to train team leads on the definitions of issues and risks and encourage identification and documentation of risks and issues.</li> <li>• Establish regular cadence to monitor issues and risks on a regular basis (RAID meeting).</li> </ul>	H	H





RAID

Decisions

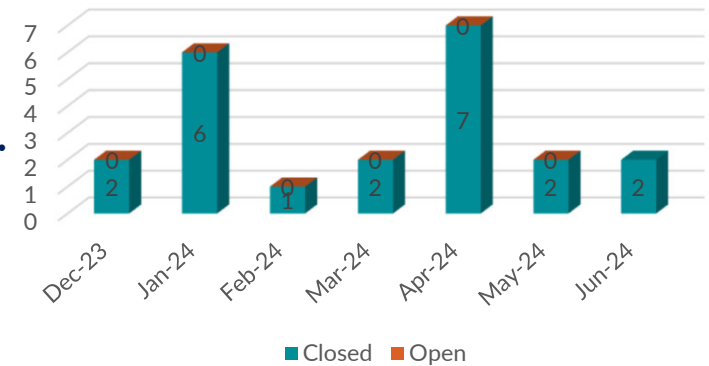


# Decisions

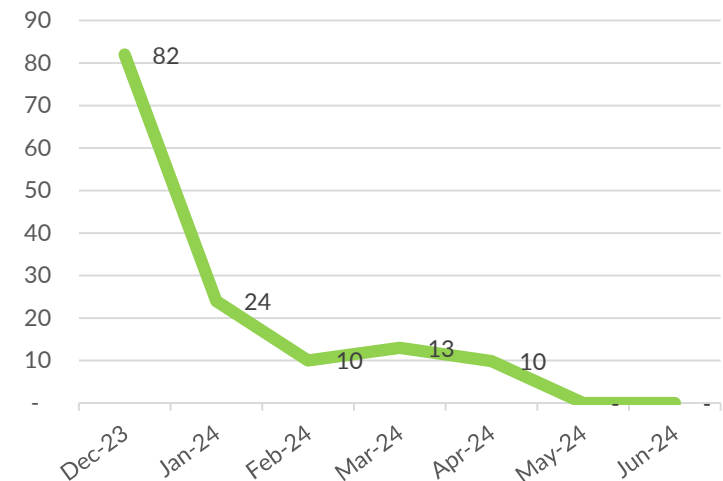


- 22 Decisions to date may indicate underutilization of logs based on the scope and complexity of the implementation.
- The Decision Log should be part of the communications effort as to what option(s) are being selected to inform staff and stakeholders of direction.
- The Decision Log should be used to inform project leadership of future directions and the reasoning for choices.
- The Decision Log should be used to support the team throughout the project when decisions are revisited to provide the history and background when future questions occur.
- Continued awareness and socialization of MVP will help to manage decisions.

Decision Log



Decisions Average Days Outstanding\*





# Thank you