

IT Professional Services Master Price and Services Agreement

Appendix A and Appendix B to Independent Quality Management Services (IQMS) Statement of Work
(Updated 2026)

Appendix A: Oregon Quality Standards

When delivering independent quality management services (IQMS), the IQMS Consultant is expected to use this appendix to identify relevant quality standards and associated risk cues in connection with Deliverable 2.1 Quality Standards. Deliverable 2.1 Quality Standards is an important aspect of quality planning that supports Deliverable 4.1 Quarterly Quality Assurance Report.

Notes to IQMS Consultant

1. A total of 107 quality standards under 16 quality categories (quality focus areas) are listed. Quality Standards marked with an asterisk (*) are required. For those quality standards not marked with an asterisk, only those relevant to a specific project need to be used.
2. Additional quality categories may be added to the extent relevant to a project. Each of these additional quality categories may consist of multiple quality standards and associated risk cues.
3. For each Quality Standard, “Low Risk Cue”, “Medium Risk Cue”, and “High Risk Cue” comprise a qualitative measurement of risk associated with the specific Quality Standard.
4. For each Quality Standard, the definition of risk cues provided in this Appendix may be changed or tailored for the needs of a specific project. This tailoring is to be performed independently by the IQMS Consultant. Input from state personnel or the state’s contractors may be sought, but cannot substitute for industry standards, best practice, and applicable expert knowledge and judgment that the IQMS Consultant must apply independently.

Summary of 2026 updates

This appendix has been updated to align with current best practices in project management and software development, and with other existing EIS standards. The following changes have been made:

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1. **Four new quality categories have been added:** (1) Testing; (2) Data Management and Governance; (3) Security; and (4) Artificial Intelligence.
2. **Three existing quality categories have been renamed:** (1) Business Mission and Goals renamed to Business Strategy; (2) Product Content renamed to Product Specification and Design; (3) Development Process renamed to Development / Configuration Process.
3. **The Development Environment quality category has been removed;** standards associated with that category have been moved to other categories, consolidated with existing standards, or removed.
4. **Individual quality standards have been added** (47 total), **removed** (22 total), or **changed** (30 total). Risk cues have been updated for all standards.
5. **The list of required standards has been updated.**

A crosswalk is included at the end of this appendix showing how the old categories and standards map onto the updated ones.

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Table: Oregon Quality Standards

Oregon Quality Standards are organized as follows:

- **QS #:** A sequentially assigned number for quality standards.
- **Quality Category:** Header that names the category in which the associated quality standards belong.
- **Quality Standard:** Named areas of potential quality standards. * indicates standards required for all projects.
- **Low Risk Cues:** Characteristics of this quality standard when it can be considered low risk to the project.
- **Medium Risk Cues:** Characteristics of this quality standard when it should be considered medium risk to the project.
- **High Risk Cues:** Characteristics of this quality standard when it should be considered high risk to the project.

Oregon Quality Standards and Categories				
QS #	Quality Standards	Low Risk Cues	Medium Risk Cues	High Risk Cues
<i>* indicates required standard</i>				
Process Standards				
Business Strategy				
1	*Project Alignment with Strategy and Business Needs	Project directly supports organization mission and/or goals.	Project indirectly impacts one or more goals of the organization.	Project does not support or relate to organization mission or goals.
2	Business Complexity	Project involves little or no change to business processes or workflow.	Project involves moderate changes to business processes or workflow.	Project significantly changes the workflow, business processes, or method of organization.
3	Goals Conflict	Goals of projects within the organization are supportive of or complimentary to each other.	Goals of projects do not conflict, but provide little direct support.	Goals of projects are in conflict, either directly or indirectly.
4	Long Term Value Creation / Benefits Realization	Expected business benefits are defined, tracked, and on track to be achieved.	Expected business benefits are not consistently defined, tracked, and/or not on track to be achieved	Expected business benefits are not defined, tracked, and/or not on track to be achieved resulting

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			resulting in minimal negative consequences.	in significant negative consequences.
5	Individual Project Outputs Align with Organizational Goals <i>(Note: This standard applies to collections of projects that are being managed as a program. IQMS Consultant may add additional program-specific standards as relevant.)</i>	Plans are clearly defined for aligning and integrating individual project outputs with the organization's operations and strategic goals.	Plans are partially defined for aligning and integrating individual project outputs with the organization's operations and strategic goals.	Plans are unclear or nonexistent for aligning and integrating individual project outputs with the organization's operations and strategic goals.
Decision Drivers				
6	Political Influences <i>(Example: The project schedule is driven by political considerations rather than realistic duration of required activities.)</i>	Politically-driven choices (if any) are not adversely impacting project.	Project has several politically motivated decisions resulting in minimal negative consequences.	Project has a variety of political influences, or most decisions are made behind closed doors, resulting in significant negative consequences.
7	Alternatives Analysis	Analysis of alternatives is complete including costs, benefits, and impacts; alternatives are fully considered; assumptions are verifiable.	Analysis of alternatives is complete; some assumptions are questionable, or alternatives are not fully considered.	Analysis of alternatives was not completed, some alternatives are not considered, and/or assumptions are faulty.
8	*Solution Sourcing	Sourcing strategy and procurement processes are	Sourcing strategy and procurement processes are not	Sourcing strategy and procurement processes are

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		clearly defined. Solution is chosen for reasons that are clearly documented and based on thorough analysis of possible alternatives.	clearly defined. Reasons for choosing solution are not clearly documented, and/or insufficient alternatives analysis was performed resulting in minimal negative consequences.	undefined, or are a poor fit for the project. Reasons for choosing solution are not clearly documented, and/or insufficient alternatives analysis was performed resulting in significant negative consequences.
9	Solution Capabilities	Solution capabilities are thoroughly vetted and documented.	Imprecise documentation of important solution capabilities, or reliance on verbal promises in lieu of written documentation.	Documentation of important solution capabilities is absent, or solution is deficient with regard to key capabilities or requirements.
10	Reasonable Delivery Date	Date for delivery has been set by using industry standard estimation methods.	Project did not use industry standard estimation methods to develop schedule and/or rationale for schedule dates is not clear.	Schedule was developed without estimation of tasks, consideration of available resources, or relationship between tasks.
11	Sustainable Technology	Multiple examples of comparable and stable implementations exist; future roadmap is clear, and project meets short term need without serious compromise to long term outlook.	Technology has few comparable implementations, known technology is being implemented in a unique way, and/or project is focused on short-term solutions with little understanding of long-term needs.	Unique implementation without meaningful comparisons, and/or no consideration given to long-term viability of the solution.

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Project Management				
12	*Project Scope Definition	Project scope is well defined and elaborated upon in sufficient detail to allow for rational estimation of schedule and budget.	Project scope is only partially defined and elaborated upon in sufficient detail to allow for rational estimation of schedule and budget, and/or is unlikely to be managed by this organization.	Project goals, objectives, and scope are not well defined or have conflicting objectives in the scope.
13	*Project Objectives	Project objectives are clear, reasonable, and measurable.	Project objectives are not clear or measurable as written.	There are no established project objectives.
14	*Leadership	Project has sponsor and leadership that are accountable and effectively engaged.	Project has sponsor responsible for project, but unable to spend enough time to direct effectively.	Project has no sponsor, or the sponsor is not engaged with the project.
15	*Project Management Approach <i>(Note: IQMS Consultant may add standards focused on specific project management processes as relevant for the project.)</i>	The project has product and process planning and controls in place based on industry standard methodologies, suitable to project size and complexity.	Product and process planning and controls need enhancement.	Product and process planning is weak or there are nonexistent planning and controls.
16	Project Management Approach – Agile Methodologies	Projects using agile or agile-hybrid approach are adhering to methodology or discipline that is clearly defined up-front. Methodology adequately	Agile methodology is defined and is being followed, but does not fully address the needs of the project.	Agile methodology is not clearly defined, or methodology has been defined but is not being followed.

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	(Note: This standard is required for agile or agile-hybrid projects. IQMS Consultant may add detailed agile-specific standards as relevant for the project.)	addresses sprint management, ceremonies, user stories and backlog management, product ownership, and release management.		
17	Project Management Communication	Project management team clearly communicates goals and status within the team and to stakeholders.	The project management team has communication challenges resulting in minimal negative consequences.	The project management team has communication challenges resulting in significant negative consequences.
18	Project Management Experience	Project management team is very experienced with similar projects.	Project management team has moderate experience with this type of project, or has experience with different types of projects.	Project management team has no experience with this type of project or is new to project management.
19	*Project Management Authority	Project management team has sufficient and formal authority that enables project leadership effectiveness.	Project management team is able to influence those elsewhere in the organization, based on personal relationships.	Project management team has little authority from location in the organization structure and little personal power to influence decision-making and resources.
20	Support of the Project Management Team	Project management team has comprehensive and effective support from the project team and agency leadership.	Project management team has partial support from the project team and agency leadership.	Project management team is not consistently and demonstrably supported by the project team and agency leadership.
21	*Project Governance and Decision Making	Project planning documents define accountability and decision-making frameworks, and these frameworks are adhered to;	Project planning documents define accountability and decision-making frameworks but may not be in alignment with	Significant gaps or missing project planning documents that define accountability and

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		there is alignment and effective collaboration between agency and project governance processes.	project authority or agency governance processes.	decision-making frameworks, or frameworks are not adhered to.
22	Vendor Management	A formal vendor management approach, process, and tool(s) are established and consistently followed.	A formal vendor management approach, process, and tool(s) are established but are not consistently followed or are only partially effective.	No approach, processes, or tool(s) are in place for vendor management, or existing approach is ineffective.
23	Product Ownership (Note: This standard is required for agile or agile-hybrid projects.)	Defined product ownership with focused roles and responsibilities.	Defined product ownership with additional work responsibilities.	Unclear or no defined product ownership.
Project Parameters				
24	Project Size and Complexity	The project is small in scope, non-complex, or easily decomposed; or is moderately complex with adequate resources and staffing to support the project.	The project is medium in scope, moderately complex, or decomposable; or is highly complex with questionable resources and staffing to support the project.	The project is large in scope, highly complex, or not decomposable; and does not have adequate resources or staffing to support the project.
25	Solution Constraints	There are few or no solution-imposed constraints; single platform or low complexity solution.	There are some solution-imposed constraints; several platforms or medium complexity solution.	There are significant solution-imposed constraints; multiple platforms or high complexity solution.
26	*Budget & Resource Size	There are sufficient budget and resources allocated and aligned with project needs.	The budget and/or resources allocated are not likely to be sufficient to complete the project as currently planned.	The budget and/or resources allocated are not sufficient to complete the project as currently planned.

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27	Funding Constraints	Funding does not pose risk to the success of the project as currently planned.	There are some uncertainties about availability of funds.	The allocation of funding is in doubt or subject to change without notice.
28	*Cost Controls	The cost control system is in place and well established.	The cost control system is in place but is weak in some areas.	The cost control system is significantly lacking, or nonexistent.
29	*Project Schedule	Project has clear and complete schedule; team agrees that schedule is acceptable and can be met; dependencies are documented and consistently tracked.	Team finds one phase of the schedule is too aggressive and unlikely to be met, and/or program dependencies are documented but inconsistently tracked.	Team agrees that two or more phases of schedule are unlikely to be met, and/or dependencies are not documented and implications or delays to downstream activities are unknown.
30	Contract Fit	Contract has appropriate terms that align with project needs and requirements.	Contract has open issues that could adversely impact the project.	Contract terms are not appropriate for the project, and/or open issues are blocking progress.
Project Team				
31	*Team Member Availability	Project team members are in place with little turnover expected; knowledge transfer processes are established.	Project team members are available with some turnover expected; some time is spent managing issues or working on tasks that are not part of this project.	Project team members are not available, there is high turnover, and the team spends most of its time managing issues or working on tasks that are not part of this project.
32	Team Skills and Experience (Note: This standard is required for internal development projects.)	The project team includes members with a suitable mix of skills and experience required for the project to succeed.	The project team includes members with required skills, but preferred skills or experience may be lacking in some areas.	The project team has gaps in crucial skills and/or there is minimum experience required for the project.

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33	Training of Team	Training is provided to all team members as appropriate. Training plans are in place and utilized.	Training is inconsistently provided to team members. Training plans are incomplete or are not utilized.	Training is not provided to team members and training plans do not exist.
34	Team Morale	Team members demonstrate confidence that the project will be successful, and are strongly committed to the success of the project.	Team members state some concerns about the success of the project but are willing to do what it takes to get the job done.	Team members state that they do not believe the project will be successful; little or no commitment to the project.
35	*Team Productivity	All milestones are met, and deliverables are on time, indicating high productivity.	Milestones are met with some delays in deliverables, indicating acceptable productivity.	Productivity is low, indicated by missed milestones and delays in deliverables.
36	Expertise with Solution Domain(s) (Note: This standard is required for internal development projects.)	Development team members have strong expertise with solution domain(s) (e.g., hardware, software, applications, cloud environment).	Development team members have some experience with solution domain(s) or can call on experts as needed.	Development team lacks expertise in crucial domain(s) in team, and no experts are available.
Organization Management				
37	*Organization Stability	Little or no change in management or structure expected.	Some management change or reorganization expected.	Management or organization structure is continually or rapidly changing.
38	Organization Roles and Responsibilities	Individuals throughout the organization understand their own roles and responsibilities and those of others.	Individuals understand their own roles and responsibilities, but are unsure who is responsible for work outside their immediate group.	Many in the organization are unsure or unaware of who is responsible for many of the activities of the organization.

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39	Policies and Standards	Policies and standards related to the business and technical domains of the project are defined and carefully followed.	Policies and standards are in place, but are weak or not carefully followed.	There are no policies or standards, or they are ill-defined or unused.
40	Management Support	Business and technical managers have expressed and demonstrated full commitment to the project's success.	Business and technical managers have expressed and demonstrated some, but not complete, commitment to the project's success.	Business and technical managers have expressed and demonstrated little or no commitment to the project's success.
41	*Executive Support	Executive level managers (steering team and sponsors) have expressed and demonstrated full commitment to the project's success.	Executive level managers have expressed and demonstrated some, but not complete, commitment to the project's success.	Executive level managers have expressed and demonstrated little or no commitment to the project's success.
42	Resource Conflict	Projects within the organization share resources without any conflict.	Projects within the organization schedule resources carefully to avoid conflict.	Projects within the organization often need the same resources at the same time (or compete for the same budget).
43	Partner Collaboration	Partners are collaborating on solutions to make changes to their systems to accommodate project impacts.	There is some partner collaboration on solutions to make changes to their systems to accommodate project impacts.	Partners are not willing or able to make changes to their systems to accommodate project impacts.
44	Business Transition	Process models of existing (as-is) and proposed (to-be) systems are available and accurate, and a plan is in place for transitioning business to the future state.	Process models of existing (as-is) and proposed (to-be) system(s) are partially available.	Process models of existing (as-is) and proposed (to-be) system(s) do not exist, and/or there is not a plan for transitioning business to the future state.
Customer/User				

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45	Organizational Change Management (OCM)	OCM approach and processes are in place and consistently followed with supporting tool(s) and measurements.	Approach, processes, tool(s), and measurements are established but not consistently followed.	No approach, process, tool(s), or measurements are in place.
46	Alignment of Customer Needs	Multiple customers of the project have common needs.	Multiple customers of the project have different needs, but needs do not conflict.	Multiple customers of the project are trying to drive it in different directions.
47	*User Involvement	Representatives of planned and potential system users are highly involved with the project team and provide significant input.	Representatives of planned and potential system users play minor roles and have a moderate impact on the system or solution.	Planned and potential system users have little to no involvement or input.
48	*User Validation	Users accept concepts and details of system; process is in place for obtaining user approvals.	Users accept most of the concepts and details of the system; process is in place for obtaining user approvals.	Users do not accept any concepts or design details of system, and/or the project team has not established processes for obtaining user approvals.
49	User Training	User training is scheduled to be/has been conducted in accordance with an approved training plan based upon assessed training needs.	User training is scheduled to be/has been conducted to meet prioritized training needs.	User training is expected to meet some but not all essential training needs or has not been scheduled.
50	User Justification	The justification for the system from a user perspective is documented, and is complete, accurate, and sound.	User justification is documented, and is complete with some questions about applicability.	There is no satisfactory user justification for the system.
51	User Expectations	Users have clear and realistic expectations of system capabilities.	Users have vague or partially incorrect expectations of system capabilities.	Users have unclear or unrealistic expectations of system capabilities.

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Product Standards				
Product Specification and Design				
52	Architecture Standards	Architecture standards are completely specified and clearly written. Architecture standards are aligned with business needs, industry standards, and any relevant statewide requirements. Standards are clearly understood by the project team.	Some architecture standards are incomplete or unclear and/or not well understood by the project team.	Architecture standards are not documented and/or not understood by the project team.
53	Adherence to Architecture Standards	Project adheres to defined architecture standards with a known escalation process to address challenges as they develop. Challenges are escalated and addressed timely and effectively.	Project does not always adhere to architecture standards. Challenges are not escalated and/or managed timely and effectively.	Project does not adhere to architecture standards, and challenges are not managed.
54	*Requirements Complete and Clear	Requirements have been reviewed and approved by program subject matter experts as measurable, traceable, complete, clear, and unambiguous.	Current wording of requirements needs work for completeness, measurability, traceability, and clarity.	Missing and/or incomplete requirements put system quality and readiness for use at risk.
55	Requirements Lifecycle Management	A process with suitable tools is in place to manage requirements scope and requirements traceability.	A process is in place to manage requirements scope and traceability, but it is missing some elements needed to be effective.	A process is not in place to manage requirements scope and traceability, or the existing process is not followed effectively.

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56	*Testability	Product requirements are specific, measurable, and easy to test as written.	Some requirements for parts of the product are ambiguous and/or subject to interpretation, making them hard to test as written.	The number of requirements that are not testable puts system quality and readiness for use at risk.
57	*Implementation Difficulty	Design elements are well defined, well understood, and reasonable for this team to implement.	Some design elements are unclear or are somewhat difficult for this team to implement.	Significant design elements are undefined or have components that this team will find very difficult to implement.
58	Solution Dependencies	Clearly defined dependencies of the solution effort, including component systems and upstream or downstream system dependencies.	Some dependencies are well understood and planned, but gaps may exist.	No clear plan or schedule for how the whole solution will come together.
59	Accessible User Interface	The development and end product incorporates user accessibility best practices, including Web Content Accessibility Guidelines (WCAG).	The development and end product meets some of the user accessibility best practices, including Web Content Accessibility Guidelines (WCAG).	The development and end product does not meet user accessibility best practices, including Web Content Accessibility Guidelines (WCAG).
60	Human-Centered Design	The interactive system is developed to be usable and useful for users, considering their needs and requirements, human factors, and usability knowledge and techniques.	The interactive system is partially developed to be usable and useful to users.	The interactive system is not developed to be usable and useful for users.
Development / Configuration Process				

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61	Legacy System Impacts	The project has completed a full analysis of impacted legacy systems with a fully developed plan to accommodate legacy systems.	The project has completed some analysis of impacts to legacy systems, but no plan is in place to accommodate legacy systems, or the plan is not being followed resulting in minor adverse impact.	No analysis of impact on legacy systems, or plan to accommodate legacy systems is not being followed resulting in significant adverse impact.
62	*Change Control Process	Formal change control process is in place for project scope (including work products), schedule, and budget; process is followed and effective.	Change control process is in place but is not followed or is ineffective.	No change control process is used.
63	Quality Assurance Approach	QA system, process, and procedures are established, followed, and effective.	QA system, process, and procedures are established, but are not well followed or are only partially effective.	QA systems, process, and procedures are not established, not followed, or are ineffective.
64	*Development or Configuration Documentation	Development or configuration documentation is complete, correct, and available.	Documentation contains some omissions and/or deficiencies, but is available.	Documentation does not exist.
65	*Solution Development / Engineering	Development process and tools are in place, established, effective, followed by the team. Examples include code repository, code review, automated testing, performance testing, pipelines, modeling tools, and role-based access.	Development process and tools are established, but are only partially effective or partially followed.	Development process and tools are not in place, not established, ineffective, or not followed.

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66	Secure Development Lifecycle	Solution contractor utilizes an industry standard methodology to ensure security is architected into the solution, and is regularly tested while it is being developed.	No secure development practices are in place, and the solution contractor is struggling to accommodate this request, or needs to be asked regularly to perform security testing.	No secure development practices in place, and no security testing is occurring during construction, resulting in costly after-the-fact fixes to add security features after the coding has been finished.
67	Lessons Learned	Lessons learned sessions are conducted and improvements made at milestones or phases.	Lessons learned sessions are conducted, but improvements are not consistently incorporated.	No lessons learned sessions are conducted, improvements are not incorporated.
Testing				
68	*Testing Strategy and Plan	Testing strategy and plan is of high quality and adheres to industry testing standards.	Testing strategy and plan lacks key elements or is not well defined.	Testing strategy and plan has not been developed, or exists but is not being adhered to.
69	*Testing Traceability	There is clear traceability between requirements and test cases.	There is a moderate level of traceability between requirements and test cases.	There is no traceability between requirements and testing.
70	Defect Tracking	The project has a documented plan, processes, and tools necessary to track and manage solution defects; the tracking plan is aligned with other project management processes.	The defect tracking plan, process, and tools are defined, but inconsistently used.	No process is in place to track solution defects.
71	Testing Metrics	Effective testing metrics have been developed and are in use.	Testing metrics have been developed but are not appropriate, or are not being used effectively.	No testing metrics have been developed.
Technology				

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72	Technology Consistent with Project Objectives	Technology planned for the project is consistent with project objectives, requirements, and applicable business and technology standards.	Technology planned for the project is not always consistent with project objectives, requirements, or standards.	Technology planned for the project does not consider or adhere to project objectives, requirements, or standards.
73	*Availability of Technology Expertise	The technology knowledge, skills, and expertise needed to complete the project and support the solution are available to the project and the agency.	The needed technology expertise exists but is not readily available.	The needed technology expertise does not exist within the organization and may not exist externally.
74	Maturity of Technology	The organization has significant understanding and experience with the selected technology.	The selected technology is well understood in the organization.	The selected technology is new to the organization and/or the state.
75	Degree of Solution Customization	The project is implementing a solution that will require minimal customization to satisfy project requirements.	The project is implementing a solution that will require a moderate amount of customization, or the degree of customization is unclear with some potential for adverse impacts to the project.	The project is implementing a solution that will require extensive customization, and/or the actual degree of customization is greater than anticipated with significant adverse impacts to the project.
76	Data Standards Incorporated into Design	Requirements contained in federal and state data standards have been elaborated as nonfunctional requirements and incorporated into data design.	Compliance with applicable federal and State data standards has been specified but specific requirements have not been elaborated as non-functional requirements and may or may not be incorporated into data design.	Federal and State data standards have not been specified for incorporation into data design.
Data Management and Governance				
77	Data Management and Governance	A comprehensive data governance strategy and plan has been	The need for data governance has been identified and development	A data governance strategy has not been identified for the

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		developed and implemented for the system(s) impacted by the project.	of the strategy and plan is occurring.	system(s) impacted by the project.
78	Cloud Data Handling	Internal controls for security, availability, processing integrity, confidentiality, and privacy are in place.	Missing some internal controls for security, availability, processing integrity, confidentiality, and privacy.	Internal controls for security, availability, processing integrity, confidentiality, and privacy are missing.
79	Data Model	The data model can fully support both transactional and reporting / analytic needs.	The data model can partially support both transactional and reporting / analytic needs with minimal operational impacts.	The data model is unable to support transactional or reporting / analytic needs with significant operational impacts.
80	Data Documentation <i>(Note: This standard is required for projects with data migration from legacy system.)</i>	Source data, reports, data dictionary, entity-relationship model are well defined and documented.	Source data, reports, data dictionary, entity-relationship model are mostly defined and documented.	Source data, reports, data dictionary, entity-relationship model are not well defined and documented.
Deployment				
81	Solution Capacity / Scalability	Solution being delivered through the project readily provides the capacity, stability, and flexibility to efficiently support the level of growth anticipated as defined by solution requirements.	Solution provides some growth capacity, operates occasionally at performance boundary levels, and/or may not be configured for efficiency creating potential for unexpected costs.	Solution provides no growth capacity or flexibility, operates continuously at performance boundary levels, and/or not configured for efficiency creating significant risk of unexpected costs.
82	*IT Support Service Impact	Requires little change to IT support service / maintenance; any change is being planned for and managed.	Requires minor changes to IT support service / maintenance, and/or the amount of work to manage the change is significant.	Requires major changes to IT support service approach or offerings, or changes are not being sufficiently planned.

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<i>* indicates required standard</i>				
83	Data Migration	Data migration requirements are clearly understood; sufficient preparation occurs prior to implementation, including consideration of data cleansing and retention; low risk to data integrity.	Data migration requirements are overly simplistic or broad, and/or preparation is not thorough.	Data migration requirements are not clearly understood, preparation is insufficient, and/or data integrity is at risk due to complexity of migration or other factors.
84	Interfaces	Little or no integration or interfaces needed; integration or interface needs (if any) are simple, on schedule, and functioning as expected.	Some integration or interfaces needed; interfaces have moderate complexity; integration or interfaces are behind schedule and/or not functioning as expected with minimal downstream impacts.	Extensive interfaces required; interfaces have significant complexity; Integration or interfaces are behind schedule and/or not functioning as expected with significant downstream impact.
85	*Deployment Approach	Deployment approach is clearly identified including timeline, roles and responsibilities, and identified risks and mitigation strategies.	Ambiguities exist, approach is not fully defined and/or roles and responsibilities are unclear.	No approach defined, or defined approach not being followed.
86	Cutover Plan	A comprehensive cutover plan exists that has been validated in advance of go-live; cutover plan is appropriately communicated.	Cutover plan exists but may not be comprehensive or validated; cutover plan is not well communicated.	Cutover plan does not exist or is only known to a select few.
Operations and Maintenance				
87	*Design Complexity	Solution design is structurally maintainable (low complexity measured or projected); interfaces are simple; regular maintenance needs are low.	Certain aspects of the system are difficult to maintain (medium complexity).	System is extremely difficult to maintain (high complexity); system will be brought down frequently for maintenance needs.

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Oregon Quality Standards and Categories				
QS #	Quality Standards	Low Risk Cues	Medium Risk Cues	High Risk Cues
<i>* indicates required standard</i>				
88	IT Resource Capacity	Analysis of internal IT resource capacity has been completed, and sufficient capacity exists.	Analysis of internal IT resource capacity has been completed, but capacity is lacking.	No analysis of internal IT resource capacity completed.
89	Support Personnel Expertise	IT support personnel have been identified, are in place, and have suitable experience with the technical domains specific to the solution.	IT support personnel are missing some areas of expertise.	IT support personnel are missing significant discipline or expertise.
90	Vendor Support	Complete support at reasonable price and in needed time frame.	Adequate support at contracted price, reasonable response time.	Little or no support, high cost, and/or poor response time.
91	*Transition to Operations and Maintenance	Agency is fully prepared for the transition to operations and maintenance; plans are in place for key activities such as knowledge transfer, support roles, and support processes.	The agency has made some preparations for the transition to operations and maintenance, but some preparations are lacking.	Little preparation or planning has occurred for the transition to operations and maintenance.
Security				
92	Security Plan	A comprehensive security plan has been developed for the system(s) impacted by the project; the plan has been implemented or is on track to be implemented at the appropriate time.	A security plan has been developed but is missing a few elements, and/or the plan is not on track to be implemented at the appropriate time.	A security plan has not been developed, is deficient in key areas, or is not being followed.
93	*Compliance with Applicable Security Standards	Applicable security standards have been identified and elaborated and how compliance will be tested/validated has been planned	Applicable security standards have been identified (but not elaborated) and/or responsibility (but not means) for helping to ensure compliance has been identified (but not planned)	Applicable security standards have not been identified and/or responsibility for helping to ensure compliance has not been determined

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Oregon Quality Standards and Categories				
QS #	Quality Standards	Low Risk Cues	Medium Risk Cues	High Risk Cues
<i>* indicates required standard</i>				
94	Availability of Security Expertise	Security support personnel with suitable expertise are available and meet the needs of the project / system.	Security support personnel are not always available or have limited expertise relative to the needs of the project / system.	Security support personnel with suitable expertise are unavailable.
95	Disaster Recovery	All areas following security guidelines; data backed up; disaster recovery system in place; procedures followed; and testing demonstrates recovery can be done in the needed RTO/RPO	Some security measures in place; backups done; disaster recovery considered, but procedures lacking or not followed.	No security measures in place; backup lacking; disaster recovery not considered.
Artificial Intelligence				
96	AI Risk Identification and Ongoing Monitoring	AI-specific risks, intended use, misuse scenarios, and monitoring responsibilities are documented; post-deployment monitoring is in place.	Some AI risks or monitoring activities are identified, but coverage is incomplete or inconsistently performed.	AI-specific risks are not identified, monitored, or reassessed after deployment.
97	AI Data Provenance and Lineage	Training, tuning, grounding, and evaluation data sources, transformations, lineage, and usage constraints are documented and traceable.	Some AI data sources or transformations are documented, but lineage is incomplete or difficult to verify.	AI data sources, transformations, or usage constraints are unknown, undocumented, or not traceable.
98	AI Model Documentation and Transparency	Model/system documentation clearly describes purpose, intended use, limitations, data dependencies, known failure modes, and human role in operation.	Documentation exists for some model elements, but important limitations, dependencies, or operating conditions are unclear.	Model/system documentation is absent or insufficient to understand how the AI should or should not be used.
99	AI Bias Detection and Mitigation	AI is evaluated for bias, unfair impacts, and representational	Some bias or fairness checks are performed, but scope, depth, or mitigation planning is limited.	No meaningful bias or fairness evaluation is performed, or

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Oregon Quality Standards and Categories				
QS #	Quality Standards	Low Risk Cues	Medium Risk Cues	High Risk Cues
<i>* indicates required standard</i>				
		gaps; mitigation steps are defined and applied where needed.		identified issues are not addressed.
100	AI Evaluation, Testing, and Re-evaluation	AI-specific evaluation is defined and repeated across pre-deployment and post-deployment stages, including performance, robustness, safety, and reliability in context.	AI evaluation occurs, but does not fully address operational context, drift, or periodic re-evaluation.	AI is not evaluated with AI-specific methods, or is not re-evaluated after release or material change.
101	Secure AI Model Development and Deployment	Controls address AI-specific security issues such as model integrity, third-party model risk, prompt/agent abuse, misuse testing, and secure deployment.	Some AI-specific security practices are applied, but gaps remain in model, agent, or third-party component protection.	AI is deployed without AI-specific security controls, misuse testing, or safeguards for model and agent integrity.
102	AI Human Oversight and Fail-Safe Mechanisms	Clear human review, override, escalation, fallback, and safe shutdown/decommission mechanisms are defined for AI use.	Human oversight exists for some scenarios, but override or fallback mechanisms are incomplete or inconsistently applied.	AI operates without clear human oversight, override authority, or safe fallback when outputs are harmful, unreliable, or out of scope.
103	AI Impact Assessment and Risk Tiering	The AI use case has been formally assessed for potential impacts on individuals, operations, rights, safety, and public trust; risk tiering is documented and informs required controls.	Some impact analysis has occurred, but risk tiering is incomplete, informal, or not tied to control decisions.	No formal AI impact assessment or risk tiering has been completed.
104	AI Incident Response and Escalation	AI-specific incident, error, or harm reporting procedures are defined, including escalation, containment, correction, and documentation.	Some incident handling exists, but AI-specific triggers, roles, or escalation paths are unclear.	No AI-specific incident reporting, response, or escalation process exists.

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Oregon Quality Standards and Categories				
QS #	Quality Standards	Low Risk Cues	Medium Risk Cues	High Risk Cues
<i>* indicates required standard</i>				
105	AI Change Management and Reapproval	Material changes to models, prompts, agents, training data, grounding sources, or configurations trigger documented review, testing, and reapproval before release.	Some AI changes are reviewed, but thresholds and required revalidation steps are not consistent.	AI changes can be made without formal review, retesting, or reapproval.
106	AI Output Disclosure and User Awareness	Users are clearly informed when they are interacting with AI or receiving AI-generated outputs, and important limitations are communicated.	AI use is disclosed in some cases, but user awareness is inconsistent or incomplete.	Users are not clearly informed when AI is being used or when outputs may require caution or review.
107	AI User feedback and continual improvement	User feedback is systematically collected, reviewed, and incorporated through defined operational processes to support continual improvement.	User feedback is collected and reviewed, but processes for incorporating it into continual improvement are inconsistent or only partially integrated into operations.	User feedback is not systematically collected, reviewed, or incorporated into operational improvement processes.

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Crosswalk mapping prior standards to updated standards

+ means standard is new

- means standard has been removed

Δ means standard has changed as noted in comments

QS# in this table corresponds to the numbering in the prior version of the standards.

QS#	Category	Quality Standard	+	-	Δ	Comments
1	Business Mission & Goals	Project Fit to Customer Organization			X	Changed to Project Alignment with Strategy and Business Needs
2	~~Business Mission & Goals~~	~~Project Fit to Provider Organization~~		X		Combined with #1
3	~~Business Mission & Goals~~	~~Customer Perception~~		X		
4	Business Mission & Goals	Work Flow			X	Changed to Business Complexity
5	Business Mission & Goals	Goals Conflict				
New	Business Mission & Goals	Long Term Value Creation / Benefits Realization	X			
New	Business Mission & Goals	Individual Project Outputs Align with Organizational Goals	X			For use with programs
6	Decision Drivers	Political Influences				
7	Decision Drivers	Convenient Date			X	Changed to Reasonable Delivery Date
8	Decision Drivers	Attractive Technology			X	Changed to Sustainable Technology
9	~~Decision Drivers~~	~~Short Term Solution~~		X		
New	Decision Drivers	Solution Sourcing	X			
New	Decision Drivers	Solution Capabilities	X			
10	Project Management	Definition of the Project			X	Changed to Project Scope Definition
11	Project Management	Project Objectives				
12	Project Management	Leadership				
13	Project Management	Project Management Approach				
New	Project Management	Project Management Approach – Agile Methodologies	X			Required for agile or agile-hybrid projects. IQMS Consultant may add detailed agile-specific standards as relevant for the project.
14	Project Management	Project Management Communication				
15	Project Management	Project Management Experience				

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QS#	Category	Quality Standard	+	-	Δ	Comments
16	Project Management	PM Attitude		X		
17	Project Management	Project Management Authority				
18	Project Management	Support of the Project Management Team				
New	Project Management	Project Governance and Decision Making	X			
New	Project Management	Vendor Management	X			
New	Project Management	Product Ownership	X			
19	Project Parameters	Project Size			X	Changed to Project Size and Complexity
20	Project Parameters	Hardware Constraints			X	Changed to Solution Constraints
21	Project Parameters	Reusable Components		X		
22	Project Parameters	Supplied Components		X		
23	Project Parameters	Budget and Resource Size				
24	Project Parameters	Budget Constraints			X	Changed to Funding Constraints
25	Project Parameters	Cost Controls				
26	Project Parameters	Delivery Commitment		X		Covered elsewhere
27	Project Parameters	Development Schedule			X	Changed to Project Schedule
28	Project Team	Team Member Availability				
29	Project Team	Mix of Team Skills			X	Changed to Team Skills and Experience
30	Project Team	Application Experience		X		Covered elsewhere
31	Project Team	Experience with Project Hardware and Software		X		Covered elsewhere
32	Project Team	Experience with Process		X		Covered elsewhere
33	Project Team	Training of Team				
34	Project Team	Team Spirit and Attitude			X	Changed to Team Morale
35	Project Team	Team Productivity				
36	Project Team	Expertise with Application Area (Domain)			X	Change to Expertise with Solution Domain(s)
37	Organization Management	Organization Stability				
38	Organization Management	Organization Roles & Responsibilities				
39	Organization Management	Policies and Standards				
40	Organization Management	Management Support				
41	Organization Management	Executive Involvement			X	Changed to Executive Support
42	Organization Management	Resource Conflict				
43	Organization Management	Customer Conflict			X	Changed to Alignment of Customer Needs

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QS#	Category	Quality Standard	+	-	Δ	Comments
New	Organization Management	Partner Collaboration	X			
New	Organization Management	Business Transition	X			
44	Customer / User	User Involvement				
45	Customer / User	User Experience		X		Misleading title; covered elsewhere
46	Customer / User	User Acceptance			X	Changed to User Validation
47	Customer / User	User Training Needs			X	Changed to User Training Needs
48	Customer / User	User Justification				
New	Customer / User	Organizational Change Management	X			
New	Customer / User	User Expectations	X			
49	Product Content	Requirements Stability		X		Covered elsewhere
50	Product Content	Requirements Complete and Clear				
51	Product Content	Testability				
52	Product Content	Design Difficulty		X		Combined with #53
53	Product Content	Implementation Difficulty				
54	Product Content	System Dependencies			X	Changed to Solution Dependencies
New	Product Content	Architecture Standards	X			
New	Product Content	Adherence to Architecture Standards	X			
New	Product Content	Requirements Lifecycle Management	X			
New	Product Content	Accessible User Interface	X			
New	Product Content	Human-Centered Design	X			
55	Development Process	Alternatives Analysis			X	Moved to Decision Drivers category
56	Development Process	Commitment Process			X	Changed to Change Control Process
57	Development Process	Quality Assurance Approach				
58	Development Process	Development Documentation			X	Changed to Development or Configuration Document'n
59	Development Process	Use of Defined Engineering Process			X	Changed to Solution Development / Engineering
60	Development Process	Early Identification of Defects			X	Revised and moved to new Testing Category
61	Development Process	Defect Tracking		X		Combined with 61
62	Development Process	Change Control for Work Products		X		Combined with #56
63	Development Process	Lessons Learned				
New	Development Process	Legacy System Impacts	X			
New	Development Process	Secure Development Lifecycle	X			
64	Development Environment	Physical Facilities		X		

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QS#	Category	Quality Standard	+	-	Δ	Comments
65	Development Environment	Hardware Platform		X		
66	Development Environment	Tools Availability		X		Covered elsewhere
67	Development Environment	Vendor Support		X		Covered elsewhere
68	Development Environment	Contract Fit			X	Moved to Project Parameters category
69	Development Environment	Disaster Recovery			X	Moved to new Security category
70	Technology	Technology Match to Project			X	Changed to Technology Consistent w/ Project Objectives
71	Technology	Technology Experience of Project Team		X		Covered under #36
72	Technology	Availability of Technology Expertise				
73	Technology	Maturity of Technology				
New	Technology	Degree of Solution Customization	X			
New	Technology	Data Standards Incorporated into Design	X			
74	Deployment	Hardware Resources for Deliverables			X	Changed to Solution Capacity / Scalability
75	Deployment	Response or Other Performance Factors		X		Combined with 74
76	Deployment	Customer Service Impact			X	Changed to IT Support Service Impact
77	Deployment	Data Migration Required			X	Changed to Data Migration
78	Deployment	Pilot Approach		X		
79	Deployment	External Hardware or Software Interfaces			X	Changed to Interfaces
New	Deployment	Deployment Approach	X			
New	Deployment	Cutover Plan	X			
80	Maintenance	Design Complexity				
81	Maintenance	Support Personnel			X	Changed to Support Personnel Expertise
82	Maintenance	Vendor Support				
New	Maintenance	IT Resource Capacity	X			
New	Maintenance	Transition to Operations & Maintenance	X			
New	Testing	Testing Strategy and Plan	X			
New	Testing	Testing Traceability	X			
New	Testing	Testing Metrics	X			
New	Data Mgmt & Governance	Data Management and Governance	X			
New	Data Mgmt & Governance	Cloud Data Handling	X			
New	Data Mgmt & Governance	Data Model	X			
New	Data Mgmt & Governance	Data Documentation	X			
New	Security	Security Plan	X			

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QS#	Category	Quality Standard	+	-	Δ	Comments
New	Security	Compliance with Applicable Security Standards	X			
New	Security	Availability of Security Expertise	X			
New	Artificial Intelligence	AI Risk Identification and Ongoing Monitoring	X			
New	Artificial Intelligence	AI Data Provenance and Lineage	X			
New	Artificial Intelligence	AI Model Documentation and Transparency	X			
New	Artificial Intelligence	AI Bias Detection and Mitigation	X			
New	Artificial Intelligence	AI Evaluation, Testing, and Re-evaluation	X			
New	Artificial Intelligence	Secure AI Model Development and Deployment	X			
New	Artificial Intelligence	AI Human Oversight and Fail-Safe Mechanisms	X			
New	Artificial Intelligence	AI Impact Assessment and Risk Tiering	X			
New	Artificial Intelligence	AI Incident Response and Escalation	X			
New	Artificial Intelligence	AI Change Management and Reapproval	X			
New	Artificial Intelligence	AI Output Disclosure and User Awareness	X			
New	Artificial Intelligence	AI User feedback and continual improvement	X			

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Appendix B: EIS Project Assessment and Variance Reports

Note to IQMS Consultant

When delivering independent quality management services (IQMS), the IQMS Consultant may be authorized by the state to deliver Deliverable 4.1 Quarterly QA Status and Improvement Reports. In performing the work of Deliverable 4.1, the Consultant must attach a completed SWQA Project Assessment Report and Project Budget & Schedule Variance Report for the quarterly reporting reference period.

Format of these reports may not be altered by the IQMS Consultant or agency management and is subject to revision by EIS Statewide Quality Assurance (SWQA) only. The latest version of the report templates as approved by SWQA must be used. Fillable versions of the current report templates are available for download on the SWQA [Independent QA Support and Services](#) web page. Example reports are provided below.

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Project Assessment Report

To ensure a consistent reporting approach and terminology used across IT projects and across agencies statewide, this template and rating scale must be used for quarterly reporting without modification.

Items (1) through (2f) will be reported from two perspectives: Current Quarter (i.e., the quarter of the reporting period), and Prior Quarter (i.e., the quarter immediately prior to the reporting period).

A second tab ("Re-baseline History") is included in this template and is required for all projects . This tab is for agency reporting only, and is not required for IQMS contractor submissions.

Project Name:		
Agency Name:		
Person completing this form and affiliation:		
Reporting Period:		
Date when form was completed:		
Technology Description		
Platforms:		
% custom:		
Funding Description		

		Prior Quarter Rating	Current Quarter Rating	Explanation	Rating Scale^
1	Overall Project Health				Red, yellow, green*
1a	Total Cost (Budget)				Red, yellow, green*
1b	Schedule				Red, yellow, green*
1c	Scope				Red, yellow, green*
1d	Resource				Red, yellow, green*
	Deliverables (Work Products)				
1e	Quality				Red, yellow, green*
2	Overall Delivery Risk				high, medium, low*
2a	Business Case				high, medium, low*
2b	Technology				high, medium, low*
2c	Funding				high, medium, low*
2d	Business Transition				high, medium, low*
2e	Long-Term Supportability				high, medium, low*
2f	Long-Term Maintainability				high, medium, low*

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Notes:

^ See below for description of scale.

* Explanation not required when "green" or "low".

1 Overall Project Health

Green = No individual health indicators are red, and no more than one individual health indicator is yellow. No critical issues are impacting ability to meet documented objectives.

Yellow = No individual health indicators are red, and two or more individual health indicators are yellow. Explanation must include action plan to mitigate areas in yellow.

Red = One or more individual health indicators are red. Explanation must include action plan to mitigate areas in red or yellow.

1a Total Cost (Budget)

Green = Actual is (is expected to be) less than 5% different (+/-) from the approved budget baseline.

Yellow = Actual is (is expected to be) 5-15% different (+/-) from approved budget baseline.

Red = Actual is (is expected to be) more than 15% different (+/-) from approved budget baseline.

1b Schedule

Green = Progress is (is expected to be) on schedule or less than 5% behind approved schedule baseline.

Yellow = Project completion is (is expected to be) delayed with the project duration 5-15% behind approved schedule baseline.

Red = Project completion is (is expected to be) delayed with project duration more than 15% behind approved schedule baseline.

1c Scope

Green = All deliverables fulfill (are expected to fulfill) stated requirements.

Yellow = At least one deliverable does not fulfill (is not expected to fulfill) stated requirements.

Red = More than one deliverable does not fulfill (are not expected to fulfill) stated requirements.

1d Resource

Green = All resources needed by internal and contractor staff are (are expected to be) available.

Yellow = Almost all resources needed by internal and contractor staff are (are expected to be) available.

Red = Almost all resources needed by internal and contractor staff are (are expected to be) unavailable.

1e Deliverables (Work Products) Quality *(Work Products include all planning and design artifacts.)*

Green = All deliverables are (are expected to be) "fit to use".

Yellow = At least one deliverables is (is expected to be) not "fit to use".

Red = More than one deliverable is not (is not expected to be) "fit to use".

2 Overall Delivery Risk

Low = No individual risk indicators are red, and no more than one individual risk indicator is yellow. No critical issues are impacting ability to meet documented objectives.

Medium = No individual risk indicators are red, and two or more individual risk indicators are yellow. Explanation must include action plan to mitigate areas in yellow.

High = One or more individual risk indicators are red. Explanation must include action plan to mitigate areas in red or yellow.

2a Business Case

Low = There is no reason to think that the original business case & ROI targets (if exist) cannot be achieved.

Medium = There is some reason to think that the original business case & ROI targets (if exist) cannot be achieved.

High = There are many reasons to think that the original business case & ROI targets (if exist) cannot be achieved.

2b Technology

Low = All technology employed (including development and testing tools) are stable.

Medium = Almost all technology employed (including development and testing tools) are stable.

High = Almost all technology employed (including development and testing tools) are unstable.

2c Funding

Low = All future tasking requires resources that are expected to be available.

Medium = Almost all future tasking requires resources that are expected to be available.

High = Almost all future tasking requires resources that are expected to be unavailable.

2d Business Transition

Low = Business transition and disruption are well planned with few surprises to business operations expected.

Medium = Business transition and disruption are planned, but surprises to business operations are expected.

High = Business transition and disruption are not planned with surprises to business operations expected.

2e Supportability *(work required to ensure proper operation of specified system functions)*

Low = All aspects of the IT investment are supportable in the long-run.

Medium = Most aspects of the IT investment are supportable in the long-run.

High = Many aspects of the IT investment are not supportable in the long-run.

2f Maintainability *(work required to enhance specified system functions)*

Low = All aspects of the IT investment are maintainable in the long-run.

Medium = Most aspects of the IT investment are maintainable in the long-run.

High = Many aspects of the IT investment are not maintainable in the long-run.

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Project Variance Report

Agency Name:	
Person completing this form and	
Reporting Period:	[e.g., Q1 2026]
Date when form was completed:	

Cost (Budget) Variance											
		Current Variance				Projected Variance at Completion					Comments*
Project	Report as of Date	Actual Expenditures	Planned Expenditures	Variance Amount	Variance Percentage	Date Baseline Occurred	Baseline Budget	Projected Expenditures (End of Project)	Projected Variance	Projected Variance Percentage	
Project A				\$ -	0%				\$ -	0.0%	
Project B				\$ -	0%				\$ -	0.0%	
Project C				\$ -	0%				\$ -	0.0%	
Project D				\$ -	0%				\$ -	0.0%	
Cost (Budget) Variance Key											
		Green		Less than 5% (+/-) variance from approved baseline budget							
		Yellow		5-15% (+/-) variance from approved baseline budget							
		Red		Greater than 15% (+/-) variance from approved baseline budget							

Schedule Variance											
		Current Variance				Projected Variance at Completion					Comments*
Project	Project Start Date	Actual Completion Date	Planned Completion Date	Variance Amount (Days)	Variance Percentage	Date Baseline Occurred	Baseline End Date	Projected End Date	Projected Variance (Days)	Variance Percentage	
Project A				0	0%				0	0.0%	
Project B				0	0%				0	0.0%	
Project C				0	0%				0	0.0%	
Project D				0	0%				0	0.0%	
Schedule Variance Key											
		Green		On schedule or less than 5% behind approved baseline schedule							
		Yellow		Delayed with project duration 5-15% behind approved baseline schedule							
		Red		More than 15% behind approved baseline schedule							

Notes:

* Explanation required when variance is yellow or red.

Template updated March 2026

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Project Variance Report Definitions

COST (BUDGET) VARIANCE

Actual Expenditures

Represents the total cost of the work completed to date. Includes state FTE, contractor payments, and software, hardware, materials, and facilities costs. Actual Expenditures include cumulative costs that have been completed and accepted by the state, up to and including the reporting period.

Planned Expenditures

Represents the value of the planned work expressed in terms of the approved budget assigned to that work in the project plan. This amount represents how much the project had planned to spend up to and including the reporting period (cumulative amount).

Cost Variance Amount: Calculation

A measure of cost performance on a project through the indicated report date. A positive value indicates a favorable condition and a negative value indicates an unfavorable condition.

Formula: Cost Variance Amount = Planned Expenditures – Actual Expenditures

Cost Variance Percentage: Calculation

This is the Cost Variance Amount expressed as a percentage. A positive value indicates a favorable condition and a negative value indicates an unfavorable condition.

Formula: Cost Variance Percentage = Cost Variance Amount / Planned Expenditures

Date Baseline Occurred

The date the project's current cost baseline was established.

Baseline Budget

The total amount of money that the project is approved to spend to deliver the scope elements of the project. This amount represents the budget as of the date of last approved baseline.

Projected Expenditures (End of Project)

Estimate of what the project will cost when the defined scope of work is completed. This attribute may be determined through the PMBOK's "Estimate to Complete (ETC) Based On New Estimate" process where the project team performs a monthly evaluation of the work remaining, and establishes an estimate of cost of that work considering current performance of resources to date. This ETC is added to the Actual Expenditures to derive the Projected Expenditures (End of Project).

Formula: Projected Expenditures (End of Project) = Actual Expenditures + Estimate to Complete (ETC). Project should calculate this amount and enter the result into the Project Variance Report.

Projected Variance: Calculation

Shows in dollars what the budget variance will be at the end of the project based on the Projected Expenditures (End of Project). A positive value indicates a favorable condition and a negative value indicates an unfavorable condition.

Formula: Projected Variance = Baseline Budget – Projected Expenditures (End of Project)

Projected Variance Percentage: Calculation

Indicates the percentage that the project will be over or under budget at completion. A positive value indicates a favorable condition and a negative value indicates an unfavorable condition.

Formula: Variance Percentage = Projected Variance / Baseline Budget

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SCHEDULE VARIANCE

Project Start Date

The date the project started.

Actual Completion Date

Indicates completion and acceptance date of milestones or work activities on a critical path that were performed during the reporting period. When there are more than one milestones or critical path work activities completed during the reporting period, the activity with the later completion date should be reported.

Note: Activities or milestones on a critical path are the sequence of schedule activities that determine the duration of the project and cannot be delayed without affecting the overall project completion date (activities with a zero float).

Planned Completion Date

Indicates planned completion date for work activities on a critical path that were performed within the reporting period.

Schedule Variance Amount (Days): Calculation

The difference in days between actual completion date and planned completion date. A positive number shows the number of days the project is ahead of schedule, a negative indicates number of days the project is behind schedule.

Formula: Schedule Variance Amount (Days) = Planned Completion Date – Actual Completion Date

Current Variance Percentage: Calculation

Expresses the Schedule Variance Amount as a percentage the project is ahead of or behind schedule since the last baseline. A positive value indicates a favorable condition and a negative value indicates an unfavorable condition.

Formula: Current Variance Percentage = Schedule Variance Amount (Days) / Planned Duration (Current)

Note: Planned Duration (Current) = Planned Completion Date – Project Start Date. This calculation is built into the Project Variance Report template.

Date Baseline Occurred

The date the project's current schedule baseline was established.

Baseline End Date

The project's approved end date. This date represents the project's end date as of the date of last approved baseline.

Projected End Date

The projected date that all the remaining work will be completed. This is determined at the time the project team establishes the monthly Projected Expenditures (End of Project) based on the results of that analysis. The Project Manager will determine the time needed to complete the remaining work to establish this date.

Projected Variance Amount (Days): Calculation

The difference (in days) between the projected end date and baseline end date. A positive value indicates a favorable condition and a negative value indicates an unfavorable condition.

Formula: Projected Variance Days = Baseline End Date – Projected End Date

Project Variance Percentage: Calculation

Expresses the Projected Variance Amount the project will finish ahead of or behind schedule. A positive value indicates a favorable condition and a negative value indicates an unfavorable condition.

Formula: Projected Variance Percentage = Projected Variance Days / Baseline Duration

Note: Baseline Duration = Baseline End Date – Project Start Date. This calculation is built into the Project Variance Report template.