



**OREGON EMPLOYMENT
DEPARTMENT
MODERNIZATION PROGRAM**

**INDEPENDENT QUALITY
MANAGEMENT SERVICES**

**3.3.22 MONTHLY QUALITY STATUS REPORT –
FEBRUARY 2022**

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1. PURPOSE

The purpose of this Monthly Quality Status Report is to assess the Unemployment Insurance (UI) Modernization Project (which includes PFMLI functionality) performance for the reporting period of February 1, 2022, through February 28, 2022. The report provides the Oregon Employment Department (OED) executives and sponsors, Enterprise Information Services (EIS), Department of Administrative Services (DAS), Legislative Fiscal Office (LFO), and OED Modernization team an overview of the current project health and status as it relates to quality and risk assessments. The Monthly Quality Status Report includes the tracking of previously reported CSG risks.



2. PROJECT QUALITY STATUS

2.1 Overall Project Health

The Project Health Rating for the UI Modernization Project is currently yellow (medium risk rank) for the reasons listed in Table 2. The following tables provide a high-level dashboard summary and the current health status of the UI Modernization Project for the period February 1, 2022, through February 28, 2022. Further details are included in the balance of this report. Changes in the current risks, or the identification of new risks, could require an adjustment of the Project Health Rating.

Table 1: Project General Information

PROJECT GENERAL INFORMATION		
Project Status “As Of” Date:		February 28, 2022
Original Project Budget:		\$106,121,029
Current Project Budget:		\$106,121,029
Project Start Date:		December 28, 2018
Project End Date:		September 30, 2024
Project Status Indicators		Trend Indicators
Green	On-track, only minor issues	+ = Improving
Yellow	One or more areas of concern	- = Declining
Red	Significant issues that limit the success of the Project	N/C = No Change
N/A	Not applicable	Does Not Apply



Table 2: Overall Project Health Rating

Overall Project Health Rating		
Previous	Current	Current Trend
Yellow	Yellow	+
<p>The overall iQMS health status rating for the UI Modernization Project as of February 28, 2022, remains yellow (medium) due to the following:</p> <ul style="list-style-type: none"> ➤ The health areas for Schedule, Organizational Readiness, and Resources remain high risk. Quality and Leadership and Governance remain ranked medium. The Budget and Scope health areas remain low risk. Both Communications and Project Management were changed from medium to low risk this reporting period. ➤ As of February 28, 2022, the CSG iQMS team is monitoring 11 risks. There are four high, three medium, and four low ranked risks. During this reporting period two risks were changed from medium risk to low risk: They are: <ul style="list-style-type: none"> ✓ Risk #2 regarding missing requirements. ✓ Risk #19 regarding lack of details for the Stakeholder Engagement Plan. ➤ The four risks ranked high are: <ul style="list-style-type: none"> ✓ Risk #6 – regarding the Modernization master schedule. The master schedule continues to be updated, and now has links to sub-schedules. Progress was made during February in the bridging activities needed to the existing systems. The activities needed are closer to being defined to the level where OED IT will be able to determine the resources needed to meet the implementation deadlines. ✓ Risk #9 – regarding organizational changes impacting the project. The development of the PFMLI Program and the Contributions and Recovery Division are both progressing. The PFMLI Program has filled many of their leadership vacancies. They are engaged with the UI Modernization project and the development of business processes and rules is moving forward. The Contributions and Recovery Division structure has been defined and they are now focusing on messaging, addressing budgetary implications, and beginning staffing activities. The Agency leadership is working cohesively and communicating with staff. Burnout remains a concern, but leadership is also modeling healthy habits to combat burnout. Staff speak positively about their work as evidenced by the feedback received during the Modernization job shadowing activities. ✓ Risk #15 – regarding OED IT skills and resources - The Modernization team has begun creating tickets for the OED IT activities needed for bridging to Frances and decommissioning activities needed. The required activities are closer to being fully defined. The project anticipates being close to 90% defined by the end of March 2022. The OED IT Leadership is monitoring this work to ensure resources are available when needed. To augment resources, OED IT leadership expect to also utilize IT staff in addition to the UI tax and benefits system experts as appropriate. ✓ Risk #17 –Progress was made identifying the work required to the existing systems for rollout 1. The meetings to determine what systems and screens need changing are productive. More work is being completed outside the meetings and the meetings are now primarily to discuss those items needing input or decisions. The team is looking at various options to determine the best fit, which usually is the least amount of change needed, while maintaining data integrity, and ensure business has the information they need. 		



2.2 Project Status Indicators

Table 3 provides the current and previous health status indicators for the UI Modernization Project for the current reporting period, February 1, 2022, through February 28, 2022. The health areas for Schedule, Organizational Readiness, and Resources remain high risk. Quality and Leadership and Governance remain ranked medium. The Budget and Scope health areas remain low risk. Both Communications and Project Management were changed from medium to low risk this reporting period.

Table 3: UI Modernization Project Health Indicators

UI Modernization Project Health Indicators by Area								
Budget			Schedule			Scope		
Previous	Current	Current Trend	Previous	Current	Current Trend	Previous	Current	Current Trend
Low	Low	NC	High	High	+	Low	Low	NC
<p>The Budget Health Indicator remains a low risk for this reporting period.</p> <p>There are no open risks regarding the budget. As of the end of January 2022, the project was under budget. The Modernization team and Agency are monitoring the budget to ensure adequate funds are available for the project.</p>			<p>The Schedule Health Indicator remains a high risk for the reporting period.</p> <p>Progress was made during February in the bridging activities needed to the existing systems. The activities needed are closer to being defined to the level where OED IT will be able to determine the resources needed to meet the implementation deadlines.</p> <p>There is no major slippage of project dates.</p> <p>The master schedule continues to be updated. There are some successor tasks identified in the schedule.</p>			<p>The Scope Health Indicator remains low for this reporting period.</p> <p>There continues to be minor scope changes based on requirements being removed or changed. The process for these changes is documented and the Modernization team is following the documented processes.</p> <p>The PFMLI scope is well integrated into the project. Any changes required due to PFMLI decisions are easily handled at this time. As the project nears testing and training the ability to accommodate the changes may be more difficult.</p>		



UI Modernization Project Health Indicators by Area								
Communication			Quality			Organizational Readiness		
Previous	Current	Current Trend	Previous	Current	Current Trend	Previous	Current	Current Trend
Medium	Low	+	Medium	Medium	NC	High	High	+
<p>The Communication Health Indicator was changed from a medium risk to a low risk during this reporting period. The external stakeholders are being engaged with the project. The Modernization team met with employer representatives to demo the new system and discuss downtime for cutover and employer representative processes. The team also sent out a survey to employers and requested volunteers for upcoming focus groups. 427 employers volunteered.</p> <p>The focus groups are scheduled for March 2022 and there are several different breakout sessions, depending on the type of employer.</p> <p>The Modernization team ensures the Combined Reporting partner representatives are included in key meetings with external stakeholders. This provides the stakeholders a clear message and reassurance the departments are working together.</p> <p>The team continues to communicate with the internal stakeholders. They are collaborating on the development of the Contributions and Recovery Division and have a good working relationship with PFMLI and the other divisions.</p>			<p>The Quality Health Indicator remains a medium risk.</p> <p>The Modernization business analysts are meeting regularly to review, as a group, different functionality and aspects of the system. These meetings are good opportunities for missing requirements to be discovered, or cosmetic updates or rewording suggestions to make the system more user friendly.</p> <p>Data integrity has been a focus for the project since the beginning and remains a major focus.</p>			<p>The Organizational Readiness Health Indicator remains a high risk.</p> <p>Staff appear to be accepting the change and the new system, as the mid-point readiness assessment results were positive. There were 874 responses, and 65% of those responses were “agree” or “strongly agree” in each category. This is an increase from 60% for the baseline assessment.</p> <p>The readiness of the existing systems is the main concern in this category, and during this reporting period, there was progress made in defining what needs to be done. The meetings to determine what activities are required are productive and options that lower risk to the system are discussed and agreed upon. The Agency is closer to be able to determine what is the body of work and are there adequate resources to complete it timely.</p>		



UI Modernization Project Health Indicators by Area								
Leadership and Governance			Project Management			Resources		
Previous	Current	Current Trend	Previous	Current	Current Trend	Previous	Current	Current Trend
Medium	Medium	+	Medium	Low	+	High	High	+
<p>The Leadership and Governance Health Indicator remains a medium risk.</p> <p>The Agency is progressing with the other projects that have the potential to put the UI Modernization Project at risk. PFMLI is making progress defining business processes and finalizing administrative rules. The Contributions and Recovery Division development is progressing with a completed organizational structure and refinement of business processes and workflow. This progress has a positive impact on the success of the UI Modernization Project.</p> <p>The Executive leadership of the Agency continue to be engaged with the project and provide leadership and guidance.</p>			<p>The Project Management Health Indicator was changed from medium to low risk.</p> <p>The Modernization team has plans to address the concerns of lack of detail in the Stakeholder Engagement Plan in the next update to the plan. They continue to manage the program management plans and conduct periodic reviews and revisions.</p>			<p>The Resource Health Indicator remains a high risk.</p> <p>The Modernization team has made progress documenting the activities needed to bridge the existing systems with Frances for rollout 1. The tickets created provide OED IT leadership with detail needed to determine the resources needed. They plan to augment the current UI tax and benefits system experts with IT staff from other areas as appropriate.</p>		



2.3 Modernization Issues Monitored by CSG

The CSG iQMS team is currently monitoring the following OED Modernization issues:

Issue #13 – Pandemic (COVID-19/Coronavirus) impacting agency priorities and resources available to continue modernization (related to CSG iQMS Risk # 11, which is ranked low risk) – The State of Oregon, as many other states in the nation, is moving from treating the coronavirus as a pandemic to an endemic. Many of the restrictions from the pandemic will be lifted in the next couple of months. There is little impact to the project progress from the pandemic currently. The Modernization team is continuing to monitor this issue.

2.4 Milestones and Deliverables Status

Table below details the status for the iQMS milestones and deliverables as of February 28, 2022.

Table 4: Milestones and Deliverables Status

Milestone or Deliverable	Due Date	Status
D1.1.1 Program and Project Risk Assessment Report – Initial	August 19, 2019	Accepted
D1.1.2 Program and Project Risk Assessment Report – Refresh #1	September 24, 2021	Accepted
D1.1.3 Program and Project Risk Assessment Report – Refresh #2	October 3, 2022	Not Started
D1.1.4 Program and Project Risk Assessment Report – Refresh #3	October 3, 2023	Not Started
D2.1 Quality Standards – Operational Definitions Report	September 20, 2019	Accepted
D2.2 - Preliminary Quality Checklists for Quality Control Reports	May 25, 2019	Accepted
D2.2 - Final Quality Checklists for Quality Control Reports	TBD – when all quality control report DEDs have been submitted	In Progress
D2.3.1 Quality Management Plan	November 18, 2019	Accepted
D2.3.2 Quality Management Plan – Refresh	November 8, 2021	Accepted
D2.4.1 Baseline QMS Work Plan	November 18, 2019	Accepted
D2.4.2 Baseline QMS Work Plan – Refresh	February 24, 2022	Submitted
D2.5 Internal/External Presentations and Special Requests	TBD-as requested by Agency	Not Started
D2.5.1 UI Modernization Procurement Finalist Maturity Assessment Plan and Schedule	March 25, 2020	Accepted
D2.5.2 UI Modernization Procurement Finalist Maturity Assessment Checklists	March 25, 2020	Accepted
D2.5.3 UI Modernization Procurement Finalist Maturity Assessment Report Format	March 25, 2020	Accepted



Milestone or Deliverable	Due Date	Status
D2.5.4 UI Modernization Procurement Finalist Maturity Assessment Report Finalist 1	May 8, 2020	Accepted
D2.5.5 UI Modernization Procurement Finalist Maturity Assessment Report Finalist 2	May 8, 2020	Accepted
D3.1.1 Request for Proposal - QC Review: Solution requirements related information and data components of the sample final solution contracts	July 22, 2019	Accepted
D3.1.2 Solution Requirements related information and data components of the proposed final solution contract with the successful Proposer QC Review	April 22, 2021	Accepted
D3.1.3 Solution Requirements (Requirements Traceability Matrix) QC Review	June 20, 2019	Accepted
D3.1.4 Solution Contractor's Implementation Plan QC Review	October 26, 2021	Accepted
D3.1.5.a Program Management Plan QC Review, as follows: Stakeholder Engagement Plan, Risk and Issue Management Plan, Change Control Plan, Scope Management Plan, Change Management Plan, and Communication and Outreach Plan	July 1, 2019	Accepted
D3.1.5.a.2 Program Management Plan QC Review refresh: Stakeholder Engagement Plan and Governance Plan	November 17, 2021	Accepted
D3.1.5.b Program Management Plan QC Review, as follows: Staff Management Plan, Procurement Management Plan, Governance Plan, and Contract Management Plan	November 1, 2019	Accepted
D3.1.5.c Program Management Plan QC Review, as follows: Budget, Budget Management Plan, Quality Management Plan, Schedule, Schedule Management Plan, Interface Plan, and System Security Plan	April 29, 2022	In Progress
D3.1.6 Documentation necessary to demonstrate compliance with the OSCIO Cloud Policy (Statewide DAS Policy 107-004-150) QC Review	TBD	Not Started
D3.1.7 Solution Contractor Test Plan QC Review (Rollout 1)	May 6, 2022	Not Started
D3.1.8.a Solution Contractor Conversion Plan QC Review (Rollout 1)	June 7, 2022	Not Started
D3.1.8.b Solution Contractor Training Plan QC Review (Rollout 1)	March 29, 2022	In Progress
D3.1.9 Stakeholder Engagement Plan	October 26, 2020	Accepted
D3.1.10 UI Modernization Business Case	February 17, 2022	Submitted
D3.3.1 – D3.3.13 Monthly Quality Status Report #1-#19	Various	Accepted



Milestone or Deliverable	Due Date	Status
D3.3.20 Monthly Quality Status Report #20 – November 2021	December 10, 2021	Accepted
D3.3.21 Monthly Quality Status Report #21 – January 2022	February 10, 2022	Under Revision
D3.3.22 Monthly Quality Status Report #22 – February 2022	March 10, 2022	In Progress
D3.3.23 Monthly Quality Status Report #23 – March 2022	May 11, 2022	Not Started
D3.3.24 Monthly Quality Status Report #24 – April 2022	June 12, 2022	Not Started
D3.3.25 – D3.3.52 Monthly Quality Status Report #25 - #39	8 business days from end of month	Not Started
D4.1.1 – D4.1.7 Quarterly QA Status and Improvement Report #1-#7	Various	Accepted
D4.1.8 Quarterly QA Status and Improvement Report – 3 rd Qtr. 2021 (#8)	October 18, 2021	Accepted
D4.1.9 Quarterly QA Status and Improvement Report – 4 th Qtr. 2021 (#9)	January 14, 2022	Accepted
D4.1.10 Quarterly QA Status and Improvement Report – 1 st Qtr. 2022 (#10)	April 14, 2022	Not Started
D4.1.11 – D4.1.17 Quarterly QA Status and Improvement Reports / Presentations	10 business days from end of quarter	Not Started
D2.6.1 Lessons Learned Reports – Periodic Project Evaluations (Contributions Phase)	December 15, 2022	Not Started
D2.6.2 Lessons Learned Reports – Periodic Project Evaluations (PFMLI Benefits Phase)	December 15, 2023	Not Started
D2.6.3 Lessons Learned Reports – Periodic Project Evaluations (UI Benefits Phase)	July 19, 2024	Not Started
D2.6.4 Lessons Learned Reports – Periodic Project Evaluations (Program Closeout)	January 9, 2025	Not Started
D2.6.5 Lessons Learned Reports – Periodic Project Evaluations (Upon Request)	TBD	Not Started
D5.3.1 Security Assessment Plan (Contributions)	May 27, 2022	Not Started
D5.3.2 Security Assessment Project Schedule (Contributions)	May 18, 2022	Not Started
D5.3.3 Security Risk Assessment Report (Contributions)	June 30, 2022	Not Started
D5.3.4 Security Assessment Executive Presentation (Contributions)	July 12, 2022	Not Started
D5.3.5 Security Assessment Plan (PFMLI Benefits)	May 26, 2023	Not Started



Milestone or Deliverable	Due Date	Status
D5.3.6 Security Assessment Project Schedule (PFMLI Benefits)	May 17, 2023	Not Started
D5.3.7 Security Risk Assessment Report (PFMLI Benefits)	June 29, 2023	Not Started
D5.3.8 Security Assessment Executive Presentation (PFMLI Benefits)	July 11, 2023	Not Started
D5.3.9 Security Assessment Plan (UI Benefits)	October 27, 2023	Not Started
D5.3.10 Security Assessment Project Schedule (UI Benefits)	October 18, 2023	Not Started
D5.3.11 Security Risk Assessment Report (UI Benefits)	November 19, 2023	Not Started
D5.3.12 Security Assessment Executive Presentation (UI Benefits)	December 11, 2023	Not Started

NOTE: Status designations for deliverables are: Not Started, In Progress (not delivered), Submitted (delivered but no response yet), Under Review (after initial review and before approval), and Accepted



3. PROJECT RISKS AND RECOMMENDATIONS DETAILS

3.1 New CSG iQMS Risks

There are no new risks identified by the CSG iQMS team for this reporting period.

3.2 Previously Reported CSG iQMS Risks

As of February 28, 2022, the CSG iQMS team is monitoring **11** risks. There are four high, three medium, and four low ranked risks previously reported. Details of the risks and the current analysis are included in the table below.

[This space left intentionally.]



Table 5: Previously Reported CSG iQMS Risks

Previously Reported CSG iQMS Risks						
CSG Risk #1: Oregon Specific Requirements Missing Risk Model ID: 175 - Functional Requirements Definition RFP ID: OR-50* Category: Quality / Requirements Mgmt.	Current	Medium Risk Rank		Previous	Medium Risk Rank	
		Medium Probability	Medium Impact		Medium Probability	Medium Impact
Risk Trigger: Oregon-specific requirements are not included in the requirements. The solution does not meet the needs of the Agency.						
<p>Risk Description: There are requirements missing from the Business Requirement document that are part of the Request for Proposal (RFP) for the UI Modernization Project solution vendor. There is concern that not all Oregon specific requirements are adequately defined in the requirement document. An example of an Oregon specific requirement missing is the One Percent Penalty that is not only specific to Oregon, but also unique in how it is calculated and the trigger for assessment compared to other penalties.</p>	<p>Recommendation: The CSG iQMS team recommends the Agency ensure comprehensive requirements have been defined in the requirement documents, with an emphasis on ensuring all Oregon specific functionality is included.</p>		<p>Current Analysis – February 2022: The Modernization business analysts are meeting regularly to review, as a group, different functionality and aspects of the system. These meetings are good opportunities for missing requirements to be discovered, or cosmetic updates or rewording suggested to make the system more user friendly.</p> <p>There are also Conversion Verification activities planned to further confirm the conversion processes are meeting the needs of business.</p> <p>The CSG iQMS team will continue to monitor this risk.</p> <p>Previous Analysis – January 2022: The Modernization team continues to verify requirements and process any deletion or changes through the Change Control Board.</p> <p>There have been some recent changes on the design for PFMLI as their administrative rules process progresses. It was expected there would be changes needed as the Definition meetings and development started before many of the PFMLI business processes were developed. None of the changes created any major rework or issues so far.</p>			



Previously Reported CSG iQMS Risks						
CSG Risk #2: Lack of Stakeholder Involvement Risk Model ID: 134 - Requirements Analysis – Stakeholder Involvement RFP ID: N/A Category: Communication/Leadership & Governance	Current	Low Risk Rank		Previous	Medium Risk Rank	
		Low Probability	Low Impact		Medium Probability	Medium Impact
<p>Risk Trigger: A significant number of customers express dissatisfaction with not being represented to shape the vision and requirements for the UI Modernization Project prior to development beginning.</p>						
<p>Risk Description: There has been no broad communication announcing the initiation of the UI Modernization Project to the customers. Employers and claimants were not included early in the UI Modernization Project planning process. The Agency expressed concern with communicating to customers too early or overwhelming them after the implementation of the OPRS 2.0 system. However, not communicating and including customers early in the project may lead to customers not supporting the system as desired, and as a result, the new system may not meet their needs. Early opportunities to improve the modernization effort may be missed.</p>	<p>Recommendation: The CSG iQMS team recommends communicating now with customers the need for the UI Modernization Project, informing them of plans for more customer involvement in the future.</p> <p>Consider asking their view of a modernized UI system and provide input to the UI Modernization Project requirements. Consider asking the customers what frequency and timing of future communications and meetings they would like to see.</p>		<p>Current Analysis – February 2022: The ranking for this risk was updated from medium to low during the reporting period due to recent engagement with the external stakeholders. The Modernization team met with employer representatives, sent out a survey, and requested volunteers for upcoming focus groups, which are scheduled for March 2022. 427 employers volunteered to be part of the focus groups.</p> <p>Previous Analysis – January 2022: The Modernization team plans to send a survey to employers and send out invites for focus groups in February 2022. This will be a good start in significant engagement of the customers.</p> <p>There will be major changes to the reporting formats that payroll companies and others need to be aware of in advance, so they are able to program the required changes in time to submit contributions/tax reports. The due date for the first report after Frances goes live isn't until October 31, 2022, so there is ample time for the changes to be communicated. The Modernization team is already in contact with some of the major software companies and informing them the change is coming.</p>			



Previously Reported CSG iQMS Risks						
CSG Risk #4: Staff Not Ready for or Accepting Modernization Change		Medium Risk Rank		Medium Risk Rank		
Risk Model ID: 110 - Agency Org. Roles and Responsibilities	Current	Medium Probability	Medium Impact	Previous	Medium Probability	Medium Impact
RFP ID: OR-38 Category: Organizational Readiness / OCM						
Risk Trigger: Staff are unable or unwilling to engage with the UI Modernization Project when needed. Staff does not adopt the change.						
Risk Description: There are concerns about staff adjusting to the change and transition with the new system. In the past there were unsuccessful change endeavors. The Agency has been dealing with an extremely high workload for over a year, with multiple different programs being introduced. Due to this, change fatigue is also a concern. PFMLI introduces a new program, requiring development of administrative rules, policies, and procedures. This is a high level of change for one Agency, and following a pandemic, it introduces additional risk and concern. The Agency, at all levels and in every area, has been working at an extremely high level for over a year. There is a high number of new staff and staff in new roles. The need for OCM is high. OCM activities with the impacted staff and groups has not yet begun but the Modernization team is developing plans.		Recommendation: The CSG iQMS team recommends beginning change management activities with all impacted IT staff involvement. Involve managers in developing change management plans, which includes training where appropriate. The CSG iQMS team also recommends the Agency provide change management training for all UI and PFMLI managers, hold staff and managers accountable to adopting and implementing the process changes, and ensure Modernization works closely with business and IT SMEs during the development of the system. Whenever possible, including staff who have been resistant in the past.		Current Analysis – February 2022: The second readiness assessment was sent out to internal staff. The number of responses were lower than the first one, which may be a result of survey burnout, as the Agency had other project ongoing at the same time. The survey responses were positive. There were 874 responses, and 65% of those responses were “agree” or “strongly agree” in each category. This is an increase from 60% for the baseline assessment. The Modernization team will use this information to help direct future OCM activities and communications. The CSG iQMS team will continue to monitor this risk. Previous Analysis – January 2022: The Frances FUSE training was conducted in January. Early feedback is staff think the training is helpful and they are excited to begin to use Frances. The work on developing the Contributions Division continues. The readiness of this division by September 2022 is critical. OED leadership continues to support and prioritize the Modernization project’s needs. There is some concern that the talking points and messages provided the managers is not getting passed onto staff. The Modernization team is evaluating how they can ensure the messages are received by all staff.		



Previously Reported CSG iQMS Risks

CSG Risk #6: Schedule Slippage is Occurring with the Modernization Schedule

Risk Model ID: 8 - Convenient Date

RFP ID: OR-7 **Category:** Schedule / Business Mission & Goals

Current

High Risk Rank

High Probability

High Impact

Previous

High Risk Rank

High Probability

High Impact

Risk Trigger: The Modernization team continues to include important milestone dates in the published master schedule that are unrealistic and not achievable.

Risk Description: The CSG iQMS team observed schedule slippage of approximately four months (from April 2019 to a planned August release) for the solution vendor RFP release, and a two-week delay in the date the RFP draft was due to be submitted to the CSG iQMS team for its QC review. This indicates that the estimating methodology for determining realistic due dates may be lacking. Without a methodology to determine realistic and achievable due dates for important milestones such as the date the RFP will be released, it triggers doubt and lack of confidence in the published schedule. Without a realistic and achievable schedule, the timely completion of dependent activities is compromised or put at risk and places a higher probability that the UI Modernization Project will not achieve its objectives on time.

Recommendation: Consider putting in place a methodology that produces a master schedule with a realistic view of resources and constraints with documented planning assumptions so that key milestones are realistic and achievable. Consider taking a baseline of the master schedule at strategic points in the (e.g., after the schedule has project been reviewed and approved by OED) and utilize disciplined project management practices to keep the master schedule on track, and report to the Modernization team when changes in the schedule occur, with appropriate justification.

Current Analysis – February 2022: The master schedule continues to be updated, and now has links to sub-schedules, though this links are accessible only if accessed locally.

Progress was made during February in the bridging activities needed to the existing systems. The activities needed are closer to being defined to the level where OED IT will be able to determine the resources needed to meet the implementation deadlines.

Previous Analysis – January 2022: The implementation schedule is on track, though concerns remain that the updates and changes required to the existing systems is not well defined. The WBS for the existing systems work is not completed. Work continues to define the OED IT work on the existing systems, to prepare for rollout 1. IT has begun some work, but it is mostly to research and help define the activities needed to be completed, not the actual activities themselves.

The master schedule includes a few dependencies, but not all are defined. The project does not have a critical path. The procurement processes (amendments with current vendors) continue to have delays but there is no critical impact to the project from these delays.



Previously Reported CSG iQMS Risks						
CSG Risk #9: Major Organizational Changes Impacting the Project Risk Model ID: 108 – Organization Stability RFP ID: 37 Category: Org Readiness / Leadership and Governance	Current	High Risk Rank		Previous	High Risk Rank	
		High Probability	High Impact		High Probability	High Impact
<p>Risk Trigger: Delays are realized due to shifting of resources, resources without the capacity to support the UI Modernization work, or scope changes due to PFMLI, impacting the timelines for the project.</p>						
<p>Risk Description: The Agency is going through a major change due to the PFMLI Division being created. There is the potential for PFMLI to impact the UI Modernization Project by:</p> <ul style="list-style-type: none"> ➤ UI Modernization Project team members leaving the project to join new division <ul style="list-style-type: none"> ✓ The UI Director and Modernization Sponsor has left UI and is the new director for PFMLI ✓ There is the potential for other team members to interview and move to PFMLI as well ➤ Shared resources within the agency needing to support two major projects at the same time ➤ Agency focus being divided by two major projects in-flight at the same time ➤ The PFMLI tax needs have many overlaps with the UI Tax requirements which makes it advantageous to look at combining some of the functionality <p>Changes in priority or focus for the UI Modernization Project could mean delays in the completion of the project. Team members leaving could cause loss of UI and project knowledge and delays in completion of tasks and decision making. These events may impact the schedule and scope for the project.</p>						
<p>Recommendation: The CSG iQMS team recommends considering preparing for potential vacancies by:</p> <ul style="list-style-type: none"> ➤ Developing transition plans for when key project sponsors, leaders, and team members are onboarding as well as off boarding ➤ Developing project orientation materials and using these for onboarding new leadership, sponsors, and team members ➤ Developing back-up plans for the key positions on the Modernization team, in case of vacancies <p>Additionally, consider:</p> <ul style="list-style-type: none"> ➤ Continue communications with the State leaders and the State Legislature on the importance and necessity of the UI Modernization Project ➤ Thoughtful management of scope changes through a Change Control Board ➤ Proactive management of shared resources to anticipate capacity issues ➤ Continued communication and cooperation between the PFMLI and UI Modernization Projects 						
<p>Current Analysis – February 2022: The development of the PFMLI Program and the Contributions and Recovery Division is progressing. The PFMLI Program has filled many of their leadership vacancies. They are engaged with the project and their development of business processes and rules is moving forward. The Contributions and Recovery Division structure has been defined and they are now focusing on messaging, addressing budgetary implications, and beginning staffing activities. The Agency leadership is working cohesively and communicating with staff. Burnout remains a concern, but leadership is also modeling healthy habits to combat burnout. Staff speak positively about their work as evidenced by the feedback received during the Modernization job shadowing activities.</p> <p>Previous Analysis – January 2022: Progress is being made in the development of the Contributions Division. The Modernization leadership is working closely with Contributions, UI, and PFMLI in the plans and development. Training for staff began with the FUSE training.</p> <p>Though there have been some changes needed to be made to Frances due to information coming to light in the PFMLI administrative rules process, there was no major impact to the project from the rework. The FAST team has been able to handle these changes with no negative impact so far.</p>						



Previously Reported CSG iQMS Risks							
CSG Risk #11: Impact of Pandemic Outbreak to Project		Current	Low Risk Rank		Previous	Low Risk Rank	
Risk Model ID:	76 –Resource Management – Back-up Strategies		Low Probability	Low Impact		Low Probability	Low Impact
RFP ID:	N/A	Category: Schedule / Scope / Project Management					
Risk Trigger: Project is delayed due to resources unable to travel, being quarantined, or resources unable to focus on Modernization.							
Risk Description: The COVID-19 outbreak is impacting many organizations and companies, requiring events to be cancelled, travel to be discouraged or prohibited, and individuals exposed to COVID-19 being quarantined for two weeks or more. If resource availability is limited due to travel restrictions or quarantine, project activities and tasks could be delayed, work could not be completed, or the quality of work could be diminished.		Recommendation: The CSG iQMS team recommends considering the following: <ul style="list-style-type: none"> ➤ Request vendors provide action plans if COVID-19 impacts travel or team member availability and ensure staff have the tools needed to work remotely ➤ Prepare back-up strategies of how the Modernization Project team will respond if staff are unable to work on-site or get the virus and ensure staff have the tools needed to work remotely ➤ Continue communicating and promoting healthy habits to prevent the spread of COVID-19 		Current Analysis – February 2022: The State of Oregon, as many other states in the nation, is moving from treating the coronavirus as a pandemic to an endemic. Many of the restrictions from the pandemic will be lifted in the next couple of months. There is little impact to the project progress from the pandemic currently. The CSG iQMS team will continue to monitor this risk. Previous Analysis – January 2022: The Modernization team worked remotely during January, with exceptions of a few staff working in the office occasionally. The FUSE training had to be remote as well. Though in person training and staff being onsite at least part time is preferred, the project continued to move forward and there were no delays or major issues from the remote work.			



Previously Reported CSG iQMS Risks						
CSG Risk #13: Impact of Executive Sponsor and UI Sponsor Turnover		Low Risk Rank		Low Risk Rank		
Risk Model ID: 26 – Leadership – Project Sponsor Involvement		Current	Low Probability	Low Impact	Previous	Low Probability
RFP ID: OR 012 Category: Project Mgmt./Leadership and Governance						Low Impact
<p>Risk Trigger: Modernization priority is reduced by the Agency; the direction of the project is changed</p>						
<p>Risk Description: The project has experienced executive sponsor turnover, including the recent resignation of Kay Erickson, OED Director and Modernization Executive Sponsor. The UI Director and Modernization Sponsor position has not been filled with a permanent position for several months. Loss of active Sponsors could put the project behind schedule as the new sponsors work to obtain knowledge, understanding, and make decisions about the project. New sponsors may also choose to take the project in a different direction which could also delay the project. The loss of the continuity could impact the project’s overall success.</p>		<p>Recommendation: The CSG iQMS team recommends the Modernization team conduct outreach, training, and knowledge transfer as a formal and scheduled process for all new project sponsors.</p>		<p>Current Analysis – February 2022: The Executive Sponsor / OED Acting Director continues to be involved with the project. The Agency leadership continues to maintain a high level of support for the project as well. There are no concerns currently.</p> <p>The CSG iQMS team will continue to monitor this risk until the OED Director position is filled on a permanent basis.</p> <p>Previous Analysis – January 2022: The Modernization Project is supported by the Agency leadership at every level. The Acting Director and Modernization Executive Sponsor is active and involved with the project as is the Deputy Director.</p>		



Previously Reported CSG iQMS Risks

CSG Risk # 15: OED IT Skills and Resources

Risk Model ID: 75a Resource Management – Technical Team Support

RFP ID: N/A **Category:** Project Resources

Current

High Risk Rank

High Probability

High Impact

Previous

High Risk Rank

High Probability

High Impact

Risk Trigger: 1. OED is unable to provide the solution vendor with system information on dependencies and interfaces or clean conversion data from existing legacy systems needed in a timely manner. 2. Unknown dependencies cause UI benefits to be impacted negatively when UI tax is implemented.

Risk Description: The IT support of existing UI systems is “single-threaded”, usually with only one resource available to support a given system. Additionally, it is estimated that approximately 40% of the IT staff are eligible for retirement within the next five years. Many of these staff are extremely knowledgeable and considered experts on the legacy system. The Agency may not have the capacity to support the legacy systems and prepare the legacy system and documentation for transition and conversion to the new system, addressing any future pandemic programs or other Agency needs, and supporting the Modernization Project at the same time.

The UI Modernization Project is huge and complex and will require significant contributions from technology resources. The recruitment of IT resources has resulted in several failed recruitments, as people with needed skill sets are not readily available or those with the skill sets are not interested in the positions.

Recommendation: The CSG iQMS team recommends:

- OED identify and document internal and external interfaces and dependencies and prepare for data migration.
- Consider other resources to assist with some of the IT support activities, such as the solution vendor, or other vendor.
- A comprehensive resource plan for IT that includes the skills and resources required as identified by the WBS.
- Identify Mainframe test region for research questions and verify existing system business rules for Definition purpose.

Current Analysis – February 2022: The Modernization team has begun creating tickets for the OED IT activities needed for bridging the existing systems to Frances and the decommissioning activities needed. The OED IT Leadership is monitoring this work to ensure resources are available when needed. They will be utilizing IT developers and systems analyst from other IT areas as appropriate.

The CSG iQMS team will continue to monitor this risk.

Previous Analysis – January 2022: This risk was raised from medium rank to high rank, due to the concerns of the Modernization team to get work assigned and resources available. There are limited sources with knowledge and experience of the current tax and benefits programs that are impacted with rollout 1. The OED IT leadership has recently started attending and monitoring the existing systems meetings and assignments to ensure adequate resources are provided to support the work need for successful implementation of rollout 1. There is a lot of work to be done, some still not defined, but they believe they will be able to obtain the resources needed. The May 2022 start of testing, when the bridging work and any needed changes for the benefit programs need to be done is approaching quickly.



Previously Reported CSG iQMS Risks						
CSG Risk #17: IT Support Tasks, Level of Effort, or Dependencies not Identified Risk Model ID: 47 Implementation Planning RFP ID: OR-43 Category: Operational Readiness and Support	Current	High Risk Rank		Previous	High Risk Rank	
		High Probability	High Impact		High Probability	High Impact
<p>Risk Trigger: 1. OED is unable to provide the solution vendor with necessary system support for dependencies such as interfaces or clean conversion data from existing legacy systems needed in a timely manner. 2. Unknown dependencies cause UI benefits to be impacted negatively when UI tax is implemented.</p>						
<p>Risk Description: There is undefined scope that must be performed by OED IT staff to coordinate with the Frances development effort. No plan or schedule exists for the work required for existing Mainframe, Web, and Data Warehouse IT staff to ensure that the necessary timeframes for integrations with Frances can be met. The lack of defined dependencies and scope of effort for IT staff tasks has the potential of negatively impacting the scope, quality, and schedule of the Frances implementation.</p> <p>There are very few knowledgeable support resources for most of the key existing mainframe systems such as OATS, IBIS, OAWS and others. Many of these systems are decades old and have seen numerous modifications as additional functionality and interfaces have been incorporated. In addition, there was a concerted effort to provide “integration” of functionality, which given the technology at the time, resulted in “hooks” embedded in program code that potentially impact both UI contributions and benefits, adding complexity to the decoupling effort.</p> <p>While there are additional Cobol resources available, only a few have the experience necessary to effectively address the complexity of the required work.</p>	<p>Recommendations: Continue to define the Existing Systems Strategy to analyze, estimate, and develop an integrated plan that identifies resources and dependencies for the OED IT work on, systems being replaced by Frances, systems impacted by Frances, internal and External Interfaces being affected by Frances, including Web and Data Warehouse systems, and reporting being affected by Frances. The plan should identify the resources needed for data conversion, interface development, and regression testing of the current production environment as changes are made for the implementation of Frances.</p> <p>Consider careful prioritization of other legacy work to maximize resource availability for Modernization efforts.</p> <p>Evaluate alternatives and methods in the work plan that would leverage the institutional knowledge of more experienced OED IT staff. Closely monitor the progress and develop alternatives if resource contention is evident.</p>	<p>Current Analysis – February 2022: During February 2022, progress was made identifying the work required to the existing systems for rollout 1. The meetings to determine what systems and screens need changes have been more productive. The team is looking at various options to determine the best fit, which usually is the least amount of change needed, while maintaining data integrity and providing the information that is needed by business.</p> <p>The CSG iQMS team will continue to monitor this risk.</p> <p>Previous Analysis – January 2022: The Modernization team and OED IT continue to meet to identify the changes needed to be made to the existing systems for rollout 1. This work is needed to be completed prior to testing, which begins in May 2022. Interface meetings with other state agencies are progressing well.</p> <p>The existing systems activities are not all defined and the WBS for this work is not complete.</p>				



Previously Reported CSG iQMS Risks

CSG Risk # 18: Concurrent PFMLI Implementation

Risk Model ID: 455 Design Clarity

RFP ID: OR-52 **Category:** Quality / Design Specification

Current

Medium Risk Rank

Medium Probability

Medium Impact

Previous

Medium Risk Rank

Medium Probability

Medium Impact

Risk Trigger: The incorporation of the PMFLI functionality into Frances has a negative impact on OCM, training, or the master schedule.

Risk Description: The business decision to incorporate the PFMLI functionality into the UI Modernization Project has, however, introduced some potential challenges for the project, including:

- The support staff will be learning both a new system (Frances) and in the case of UI tax staff, a new program (PFMLI) creating the potential need for additional organizational change and training support. There are likely similar impacts to other support functions such as audits and collections.
- The potential impact on the training schedule and system development effort to facilitate additional requirements of PFMLI.
- The PFMLI program has not been fully implemented and is in the process of developing the supporting policy and Administrative Rules concurrent with the definition process for Frances introducing the potential for rework.

Recommendations: The Modernization team should consider a focused effort to identify the potential impacts to the current project plan and schedule and develop necessary mitigations.

The Modernization team and Contributions team should consider planning additional resources or time for training the Contributions team who will need both system training and program training. Consider initiating PFMLI program training as soon as PFMLI contributions are defined.

The PFMLI Program should continue developing the business processes and detailed requirements for PFMLI benefits, to ensure PFMLI BAs and SMEs are prepared for the Definition phase of rollout 2.

Current Analysis –February 2022: The PFMLI Program is making progress on the development of the administrative rules for both contributions and benefits. Resource concerns are arising from some of the shared service areas. The Agency is prioritizing work and communicating to ensure no major issues arise.

The CSG iQMS team will continue to monitor this risk.

Previous Analysis – January 2022: There have been some recent changes in the design due to PFMLI changes based on feedback during their administrative rules process. The changes were easily handled by the development team.

PFMLI is working on benefits processes and procedures to prepare for the Definition phase of rollout 2.

The training approach for Modernization details a four-tiered approach that will provide the end users the information needed to perform their jobs in the new system. Each group will be given enough time to schedule all employees without depleting all department resources at a single time. FAST provided FUSE to employees impacted by Phase 1 during January 2022.



Previously Reported CSG iQMS Risks						
Risk # 19: Lack of documented details for the Stakeholder Engagement Plan and related artifacts. Risk Model ID: 66 – Stakeholder Engagement - Planning RFP ID: N/A Category: Project Management Planning	Current	Low Risk Rank		Previous	Medium Risk Rank	
		Low Probability	Low Impact		Medium Probability	Medium Impact
Risk Trigger: Stakeholders do not support the change or resist the new system.						
<p>Risk Description: The Stakeholder Engagement Plan does not include key elements for stakeholder engagement. The plan does not include:</p> <ul style="list-style-type: none"> ➤ Complete analysis of all stakeholders. The Stakeholder Registry includes some parts of analysis, mostly for internal stakeholders, but very few details for external stakeholders. The registry is not completed to the level needed to understand the plan for stakeholder engagement. ➤ A schedule of planned stakeholder engagement activities. The Stakeholder Registry holds some, but there is no one place documenting the planned activities for stakeholder engagement. ➤ The process for monitoring and measuring stakeholder involvement and assessing the effectiveness of the engagement strategies. ➤ A stakeholder gap analysis, which would include the current state and the desired future state of stakeholder acceptance. 	<p>Recommendation: The CSG iQMS team recommends:</p> <ul style="list-style-type: none"> ➤ Updating the Stakeholder Engagement Plan and related documents to include the details to support all stakeholders’ engagement throughout the project. Include the when and where for the planned activities. ➤ If missing data is documented in other artifacts, clearly reference where the documentation can be found, such as committee charters, stakeholder registry, etc. ➤ Completing the Stakeholder Registry with details regarding each planned engagement. ➤ Updating the plan with the process for monitoring and measuring stakeholder involvement and assessing the effectiveness of the engagement strategies. ➤ Updating the plan to include stakeholder gap analysis. 		<p>Current Analysis – February 2022: This risk was changed from medium rank to low rank during this reporting period as the Modernization team has added the CSG recommendations to their update list for the Stakeholder Engagement Plan. They have stakeholder engagement plans documented outside the plan currently.</p> <p>The Modernization team met with representative of large payroll reporting firms during the month. They received input and guidance on how the transition to the new system can be made easier for the employer community. They are also conducting focus groups with several hundred employers who have volunteered to participate.</p> <p>Previous Analysis – January 2022: The recommended updates to the Stakeholder Engagement Plan are included as updates for the next revision.</p> <p>The Modernization team is planning and moving forward with stakeholder engagement activities. A survey to employers is planned for February 2022 and focus groups are planned for later in the project.</p>			



3.3 Resolved Risks

Risks are closed when the CSG iQMS team determines sufficient mitigation actions have taken place to resolve the risk or the risk is no longer applicable to the project for other reasons (e.g., a sub-project has ended). If a risk identified by the CSG iQMS team reoccurs after it has been closed it will be reopened and recommendations provided. No risks were closed during this reporting period.



4. CATALOG OF REVIEWS

During the current reporting period, February 1, 2022, through February 28, 2022, the CSG iQMS team reviewed Modernization documents and materials, attended Modernization meetings, and interviewed Modernization stakeholders. Over the course of the project life cycle, materials may be re-reviewed over time as they support the iQMS activities.

4.1 Documents and Materials Reviewed

During the reporting period, the CSG iQMS team reviewed the materials listed in the table below.

Table 6: Documents and Materials Reviewed

Document or Material Reviewed	File Name
PFMLI Year In Review	PFMLI Year In Review (email)
Modernization Work Breakdown Session – Factor Charging and Experience Rating 1/3/2022 Meeting Minutes	Meeting Minutes for 1/3/22 Modernization work breakdown session – FACTOR CHARGING / EXPERIENCE RATING
Frances Risk and Issues Register 12-2021	Frances Risk and Issues Register 12-2021
Finalize List of Payment Targets & Vouchers Meeting Notes	Finalize List of Payment Targets & Vouchers (email)
Mod Master Schedule 2021-12 EOM	Mod Master Schedule 2021-12 EOM
OED Modernization Program and UI Modernization Project Risk and Issue Report 2021-12-31	OED Modernization Program and UI Project Risk and Issue Report 2021-12-31
Modernization Contract Management Plan V3.0	Modernization Contract Management Plan V3.0
Change Request 14 – Requirement PFMLI-PEP-007 – Equivalent Plan Penalties	Change Request 14 – Requirement PFMLI-PEP-007 – Equivalent Plan Penalties
Charge Request 15 – Requirement RPS-017 – Exclude Test Accounts	Charge Request 15 – Requirement RPS-017 – Exclude Test Accounts
Change Request 16 – Requirement TEC-TST-01 – Allow for Test SSNs	Change Request 16 – Requirement TEC-TST-01 – Allow for Test SSNs
Change Request 17 – Requirement TEC-TST-02 – Allow for Test Accounts	Change Request 17 – Requirement TEC-TST-02 – Allow for Test Accounts
Change Request 18 – Requirement TEC-TST-03 – Test Account Exclusion	Change Request 18 – Requirement TEC-TST-03 – Test Account Exclusion
Change Request 19 – Requirement TEC-SCRC-01 – FedRamp Cloud Hosting Requirements	Change Request 19 – Requirement TEC-SCRC-01 – FedRamp Cloud Hosting Requirements
Change Request 20 – Requirement TEC-SCRC-04 – Physical, Environmental Protection Policy	Change Request 20 – Requirement TEC-SCRC-04 – Physical, Environmental Protection Policy
Change Request 21 – Requirement TEC-SCRC-12 – Data Hosted in US Only	Change Request 21 – Requirement TEC-SCRC-12 – Data Hosted in US Only



Document or Material Reviewed	File Name
Change Request 22 – Requirement TEC-SCRC-15 – Discrete Data Storage	Change Request 22 – Requirement TEC-SCRC-15 – Discrete Data Storage
Change Request 23 – Requirement TEC-SCRC-36 – Data Loss Prevention	Change Request 23 – Requirement TEC-SCRC-36 – Data Loss Prevention
Change Request 24 – Requirement TEC-Doc-01 – Logical Network Diagram	Change Request 24 – Requirement TEC-Doc-01 – Logical Network Diagram
Change Request 25 – Requirement TEC-DOC-10 – Representation of Technical Infrastructure	Change Request 25 – Requirement TEC-DOC-10 – Representation of Technical Infrastructure
Change Request 26 – TEC-INT-18 – Customer Service Tool Interfaces	Change Request 26 – TEC-INT-18 – Customer Service Tool Interfaces
Mainframe Training for Conversion Validation	Mainframe Training for Conversion Validation (One Note)
UI Modernization Project Status Report 2021-12	UI Modernization Project Status Report 2021-12
OED Modernization Program and UI Project Risk and Issue Report 2021-12-31	OED Modernization Program and UI Project Risk and Issue Report 2021-12-31
Modernization Project Budget Report – Nov 2021	Modernization Project Budget Report – Nov21
2021-11-15 Modernization ESC Agenda and Minutes DRAFT 2021-12-31	2021-11-15 Modernization ESC Agenda and Minutes DRAFT 2021-12-31
OED MOD DOR Biweekly Meeting Minutes	OED MOD DOR Biweekly Meeting (email 1/21/2022)
OED MOD SOS Monthly Meeting Minutes	OED MOD SOS Monthly Meeting (email 1/21/2022)
MOD Existing Systems Weekly Update Meeting Notes	MOD Existing Systems Weekly Update Meeting Notes (email 1/27/2022)
Bridging Check In Minutes – 1/28/2022	Bridging Check In – Minutes (email)

4.2 Interviews Conducted

The details of the interviews that the CSG iQMS team conducted during February 2022 are in the table below.

Table 7: Interviews Conducted

Interviewees	Interview Date	CSG Participants
Renee Royston	February 10, 2022	Jayne Martin
Steve Berrios	February 10, 2022	Jayne Martin
Daryl Mitchell	February 10, 2022	Jayne Martin
Rocky Zachary	February 11, 2022	Jayne Martin
Ashli Machado	February 11, 2022	Jayne Martin
Maggie Gleason	February 14, 2022	Jayne Martin



Interviewees	Interview Date	CSG Participants
James Wollenweber	February 14, 2022	Jayne Martin
Martha Fitts	February 14, 2022	Jayne Martin
Bill Truex	February 15, 2022	Jayne Martin
David Gerstenfeld	February 23, 2022	Jayne Martin and Drew Sutter
Rick Heinichen	February 28, 2022	Jayne Martin

4.3 Meetings Attended

The CSG iQMS team attended the meetings listed in the table below during this reporting period.

Table 8: Meetings Attended

OED Modernization Meetings	Scheduled Date	CSG Participant
iQMS Touchbase	February 1, 2022	Jayne Martin
Business Team Weekly Check In	February 2, 2022	Jayne Martin
Modernization Schedule Management Review	February 2, 2022	Jayne Martin
Data Purification Meeting	February 2, 2022	Terri Grenda
Bridging Follow Up	February 2, 2022	Terri Grenda
Oregon Employment Department Follow Up (National Directory of New Hire)	February 3, 2022	Jayne Martin
MOD Existing Systems Weekly Meeting	February 3, 2022	Jayne Martin
Office of Child Support Enforcement (OCSE)	February 3, 2022	Jayne Martin
Ad Hoc OPT Meeting	February 4, 2022	Jayne Martin
iQMS Touchbase	February 8, 2022	Jayne Martin
Modernization Schedule Management Review	February 9, 2022	Jayne Martin
Bridging Follow-up	February 9, 2022	Jayne Martin
Mod Risk and Issue Management Meeting	February 14, 2022	Jayne Martin
OED Mod and DCBS Biweekly Meeting	February 14, 2022	Terri Grenda
Stakeholder Engagement – Planning for 2/23 session with Stakeholder Board reps	February 15, 2022	Jayne Martin
MOD Project Monthly ALL STAFF Meeting	February 15, 2022	Jayne Martin



OED Modernization Meetings	Scheduled Date	CSG Participant
OED MOD and DOR Biweekly Meeting	February 15, 2022	Terri Grenda
Decommissioning	February 15, 2022	Jayne Martin
Modernization Schedule Management Review	February 16, 2022	Jayne Martin
Modernization Operations and Policy Team Meeting	February 17, 2022	Jayne Martin
MODist Open House	February 17, 2022	Jayne Martin
ESC Talking Points Walk Through	February 17, 2022	Jayne Martin
Action Item #15859 (BA working with Developer)	February 17, 2022	Jayne Martin
Frances BA System Review	February 18, 2022	Jayne Martin
CSG Amendment Deliverable List Touch Base	February 21, 2022	Jayne Martin
Modernization Executive Steering Committee Meeting	February 22, 2022	Jayne Martin and Drew Sutter
Oregon Employment Department Modernization Project Stakeholder Board Employers Conversation	February 23, 2022	Jayne Martin
Frances BA Review Session	February 24, 2022	Jayne Martin
Monthly Communications Planning	February 24, 2022	Jayne Martin
Decommissioning	February 25, 2022	Jayne Martin
Managers Modernization Monthly Update	February 25, 2022	Jayne Martin
Frances BA System Review	February 28, 2022	Jayne Martin
OED Mod DCBS Biweekly Meeting	February 28, 2022	Jayne Martin



5. QUALITY CONTROL PLAN FOR NEXT MONTH

The quality management activities planned by the CSG iQMS team for the next reporting period are detailed in the tables in this section. Due dates are based on the latest draft of the iQMS project schedule.

5.1 Milestones and Deliverables Due

Table 9: Milestones and Deliverables Due

Milestone/Deliverable	Date Due	Status
3.3.22 Monthly Quality Status Report	March 10, 2022	In Progress
3.1.8.b Frances Training Plan QC Review Report	March 28, 2022	In Progress

NOTE: Status designations for deliverables are: Not Started, Submitted, In Progress, Under Review, and Accepted

5.2 Planned iQMS Interviews

Table 10: Planned iQMS Interviews

Interviewee Name	Date	CSG Participant
Renee Royston	March 10, 2022	Jayne Martin
Lisa Schriever	March 11, 2022	Jayne Martin
Desi Villaescusa	March 14, 2022	Jayne Martin
Annie Stevens	March 14, 2022	Jayne Martin
Vann Keo	March 14, 2022	Jayne Martin
Kris Araki	March 14, 2022	Jayne Martin
Keith Shribbs	March 16, 2022	Jayne Martin
Jenna Pourciau	March 16, 2022	Jayne Martin
Alex Kasner	March 18, 2022	Jayne Martin
Juan Serratos	March 18, 2022	Jayne Martin
Bill Truex	March 21, 2022	Jayne Martin
Matt DeRosa	March 21, 2022	Jayne Martin
Leanne Singleton	March 21, 2022	Jayne Martin
Martin Hepp	March 30, 2022	Jayne Martin



5.3 Planned Meeting Attendance

Table 11: Planned Meeting Attendance

Modernization Meetings	Meeting Date	CSG Participants
Conversion and Purification Weekly Meeting	March 1, 2022	Jayne Martin
iQMS Touchbase	March 1, 2022	Jayne Martin
OED Mod DOR Bi-weekly Meeting	March 1, 2022	Jayne Martin
Frances PFMLI Checkpoint Presentation #2	March 1, 2022	Jayne Martin
Modernization Schedule Management Review	March 2, 2022	Jayne Martin
Business Team Weekly Check In	March 2, 2022	Jayne Martin
Decommissioning	March 2, 2022	Jayne Martin
Review Frances Online Screens for Content	March 2, 2022	Jayne Martin
OED Mod SoS Monthly Meeting	March 3, 2022	Terri Grenda
Decommissioning	March 3, 2022	Terri Grenda
Modernization Budget Meeting	March 3, 2022	Jayne Martin
Modernization Existing Systems Weekly Update and Discussion	March 3, 2022	Jayne Martin
Decommissioning	March 4, 2022	Terri Grenda
OED Modernization Stakeholder Board	March 7, 2022	Jayne Martin
iQMS Touchbase	March 8, 2022	Jayne Martin
MOD Project Monthly ALL STAFF Meeting	March 8, 2022	Jayne Martin
Conversion and Purification Weekly Meeting	March 8, 2022	Jayne Martin
Modernization Schedule Management Review	March 9, 2022	Jayne Martin
Decommissioning	March 9, 2022	Jayne Martin
Business Team Weekly Check In	March 9, 2022	Jayne Martin
MOD Existing Systems Weekly Update and Discussion	March 10, 2022	Jayne Martin
Decommissioning	March 10, 2022	Jayne Martin
Change Control Board – Monthly Meeting	March 14, 2022	Jayne Martin
Mod Risk and Issue Management Meeting	March 14, 2022	Jayne Martin
Decommissioning	March 14, 2022	Jayne Martin



Modernization Meetings	Meeting Date	CSG Participants
OED Mod and DCBS Biweekly Meeting	March 14, 2022	Jayne Martin
OED Mod and DOR Biweekly Meeting	March 15, 2022	Jayne Martin
Decommissioning	March 15, 2022	Jayne Martin
iQMS Touchbase	March 15, 2022	Jayne Martin
Conversion and Purification Meeting	March 15, 2022	Jayne Martin
MODist Open House	March 15, 2022	Jayne Martin
Business Team Weekly Check In	March 16, 2022	Jayne Martin
Modernization Schedule Management Review	March 16, 2022	Jayne Martin
Decommissioning	March 16, 2022	Jayne Martin
MOD Existing Systems Weekly Update and Discussion	March 17, 2022	Jayne Martin
Modernization Operations and Policy Team	March 17, 2022	Jayne Martin
Decommissioning	March 17, 2022	Jayne Martin
ESC Talking Points Walk Through	March 18, 2022	Jayne Martin
Decommissioning	March 21, 2022	Jayne Martin
Modernization Executive Steering Committee Meeting	March 21, 2022	Jayne Martin and Drew Sutter
iQMS Touchbase	March 22, 2022	Jayne Martin
Decommissioning	March 22, 2022	Jayne Martin
Business Team Weekly Check In	March 23, 2022	Jayne Martin
Modernization Schedule Management Review	March 23, 2022	Jayne Martin
Decommissioning	March 23, 2022	Jayne Martin
Decommissioning	March 24, 2022	Terri Grenda
Monthly Communications Planning	March 24, 2022	Terri Grenda
MOD Existing Systems Weekly Update and Discussion	March 24, 2022	Jayne Martin
Managers Modernization Monthly Update	March 25, 2022	Jayne Martin
Decommissioning	March 29, 2022	Jayne Martin
Conversion and Purification Weekly	March 29, 2022	Jayne Martin
iQMS Touch Base	March 29, 2022	Jayne Martin
OED Mod and DOR Biweekly Meeting	March 29, 2022	Jayne Martin



Modernization Meetings	Meeting Date	CSG Participants
Business Team Weekly Check In	March 30, 2022	Jayne Martin
Decommissioning	March 30, 2022	Jayne Martin
Modernization Schedule Management Review	March 30, 2022	Jayne Martin
Decommissioning	March 31, 2022	Jayne Martin
Modernization Budget Meeting	March 31, 2022	Jayne Martin
Modernization Existing Systems Weekly Update and Discussion	March 31, 2022	Jayne Martin