

IT Project Portfolio Report
LFC Meeting Date: September 27, 2012

No.	General Project Information					Schedule Dates				Project Amounts							Project Health						
	Agency	Title	Current Phase	Sponsor	Actual Start Date	Original End Date	Revised End Date	% of Work Completed	Total Estimated Cost		Appropriated Budget Amounts			Expended		Scope	Schedule	Budget	Risk	Overall	Indep. Verif.		
									Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other: note source in comment area	Total							Total	%
1	DLI	Licensing Standard System	IMP	Kane, Jack	2/23/2010	6/13/11	1/23/12	96.0%	\$2,000,000.00	\$1,500,000.00	\$0.00	\$2,250,000.00	\$0.00	\$0.00	\$2,250,000.00	\$911,814.00	40.5%	●	●	●	●	●	
Agency Comments: Licensing component put into production 1/23/12. Public access opened a week later. All license types now online. Expended is less because was including HB2 money previously and should not have been																							
2	DLI	BSD One-Stop ePermit	IMP	Kane, Jack	8/15/2009	11/30/10	1/23/12	98.0%	\$2,000,000.00	\$1,800,000.00	\$0.00	\$2,250,000.00	\$0.00	\$0.00	\$2,250,000.00	\$864,479.00	38.4%	●	●	●	●	●	
Agency Comments: Internal and Mobile Office pieces were put into production 11/10 and are successfully being used. Work then began on the public-facing portions and are complete. Expended is less because was including HB2 monthly previously and should not have been																							
3	DLI	UI Tax Modernization (STAARS) RFP	DEV	Kane, Jack		11/1/12		35.0%	\$208,062.00	\$208,062.00	\$0.00	\$0.00	\$208,062.00	\$0.00	\$208,062.00	\$64,701.00	31.1%	●	●	●	●	●	
Agency Comments: This is only the RFP portion of this effort. Approximately 3/4 of our requirements gather JAD sessions have been held. Portions of the RFP have been written. Target RFP issue date is 6/12/2012, with contract signing targeted for 11/1/2012																							
4	DOJ	MERLIN Phase 3 Drivers	Planning	Burton, Tim	1Q 2012	3Q 2016	TBD	3.0%	\$5,100,000.00	\$5,100,000.00		\$5,100,000.00		\$5,100,000.00	\$93,228.50	1.8%	●	●	●	●	●		
Agency Comments: MERLIN (Montana Enhanced Registration and Licensing Information Network) Phase 1 and Phase 2 are in production (Accounting, Motor Vehicle Services, Dealer Services). The third and final phase is planned in four parts (1. Accounting and Unified Customer; 2. Electronic Payment Services; 3. Customer Service Portal; 4. Driver Services). Phase 3 Parts 1 & 2 are underway, in the Initiating and Planning stages.																							
5	DOJ	Enterprise Content Management (ECM) MVD Imaging System	(Pre)	Burton, Tim	3Q 2012	2Q 2013	TBD	0.0%	\$325,000.00	\$325,000.00			\$325,000.00	\$325,000.00	\$186,083.50	57.3%	●	●	●	●	●		
Agency Comments: The ECM MVD Imaging Solution is a five phase project focused on: 1) Driver Document Management System workflow-based replacement of the obsolete IntelliVUE system; 2) Court Actions document scanning and interface workflow with Montana Office of the Court Administrator via SharePoint; 3) Commercial Driver's License and Medical Certification document imaging workflow; 4) disability placard workflow processing; and 5) provide for the extension of the ECM capability to support other MVD and DOJ Division imaging business needs as funding allows. Appropriated Budget Amounts: E-Commerce funds will be committed to the implementation of the MVD Imaging Solution project.																							
6	DOJ	Montana Insurance Verification System (MTIVS)	Execution	Burton, Tim	2Q 2011	2Q 2016	TBD	50.0%	\$2,700,464.00	\$4,500,464.00		\$4,500,464.00		\$4,500,464.00	\$370,712.00	8.2%	●	●	●	●	●		
Agency Comments: The MTIVS solution provides the ability for law enforcement, courts, MVD, and other authorized users to determine if a Montana motorist has valid insurance for their vehicle(s).																							
7	DOR	Imaging & Scanning	IMP	Peura, Alan	11/1/2009	6/30/11	12/31/12	90.0%	\$4,000,000.00	\$3,242,905.00	\$3,242,905.00	\$0.00	\$0.00	\$0.00	\$3,242,905.00	\$2,879,370.85	88.8%	●	●	●	●	●	
Agency Comments: An additional phase had been approved to implement disaster recovery and failover to the Miles City data center for imaging data. The data center is projected to be ready for this project in Fall of 2012.																							
8	HHS	CHIMES-Supplemental Nutrition Assistance Program (SNAP)	DEV	Palagi, Jamie	01/01/10	10/1/12	N/A	94.0%	\$13,070,000.00	\$14,323,405.82	\$6,662,430.48	\$0.00	\$7,660,975.33		\$14,323,405.82	\$8,793,892.00	61.4%	●	●	●	●	●	
Agency Comments: CHIMES-SNAP includes \$13.04m from Long Range IT, including transfers, and \$1.28m from HB2 appropriations. Expended to Date reflects actuals costs through July 31, 2012.																							
9	HHS	CHIMES-Temporary Assistance for Needy Families (TANF)	DEV	Palagi, Jamie	01/01/10	10/1/12	N/A	94.0%	\$16,225,000.00	\$15,981,871.82	\$7,177,387.43	\$0.00	\$8,804,484.52		\$15,981,871.95	\$8,877,203.00	55.5%	●	●	●	●	●	
Agency Comments: CHIMES-TANF includes \$14.6m from Long Range IT, including transfers, and \$1.3m from HB2 appropriations. Expended to Date reflects actuals costs through July 31, 2012.																							
10	HHS	Medicaid Management Information System (MMIS)	DDI	Dalton, Mary	04/02/12	3/2/15	N/A	10.0%	\$65,500,000.00	\$77,496,947.00	\$9,927,359.00	\$0.00	\$67,569,588.00		\$77,496,947.00	\$4,099,264.00	5.3%	●	●	●	●	●	
Agency Comments: MMIS includes \$69m from Long Range IT, including transfers, and \$8.4m from HB2 appropriations. Expended to Date reflects actuals costs through July 31, 2012.																							
11	HHS	Vocational Rehabilitation (VR) Case Management System	PLN	Marks, Jim	06/30/12	5/1/13	N/A	0.0%	\$1,593,000.00	\$1,593,000.00	\$339,310.00	\$0.00	\$1,253,690.00		\$1,593,000.00	\$0.00	0.0%	●	●	●	●	●	
12	HHS	Statewide Automated Child Welfare Information System (SACWIS) Safety Assessments and Centralized Intake - SAMS	PLN	Corbally, Sarah	07/01/12	6/30/14	N/A	0.0%	\$1,832,330.00	\$1,832,330.00	\$1,282,630.00	\$0.00	\$549,700.00		\$1,832,330.00	\$62,607.76	3.4%	●	●	●	●	●	●
13	MPERA	Oversight Project Management & IV&V	DEV	Minnehan, Roxanne	03/14/11	4/1/15		15.3%	\$435,228.00	\$435,228.00	\$0.00	\$0.00	\$435,228.00	\$0.00	\$435,228.00	\$59,942.70	13.8%	●	●	●	●	●	
Agency Comments: Funding source is Pension Administration. The MPERAtiv project was unanimously approved by the Public Employee's Retirement Board on 10/14/2010. Work is proceeding as planned, on time and within budget. Success criteria: 1) Contract with a project management firm with extensive experience providing project management consulting services in the area of public sector pension benefit administration for the purpose of a comprehensive review of MPERA's current and development of new Line of Business (LOB) information related systems. Agency released the RFP on 10/19/2010 and the contract awarded to Provaliant, on 12/14/2010. 2) Provide project monitoring, quality assurance, Independent Verification and Validation (IV&V), and oversight project management for the Data Cleansing, Imaging and Line of Business projects throughout all phases of each project development lifecycle.																							
14	MPERA	Data Cleansing - Implementation	DEV	Davis, Patty	08/05/12	9/5/16		22.0%	\$487,098.00	\$487,098.00	\$0.00	\$0.00	\$450,000.00	\$0.00	\$450,000.00	\$96,445.40	19.8%	●	●	●	●	●	●
Agency Comments: Funding source is Pension Administration. Project was unanimously approved by the Public Employee's Retirement Board on 10/14/2010. Agency released the RFP on 6/20/2011 and the contract awarded to Ventera, on 8/05/2011. Project kick off was held on 9/6 - 9/7. Work is proceeding as planned, on time and within budget. MPERA and Ventera have completed the initial data identification phase, the Data Analysis project phase and we are 84% complete with the Data Cleansing project phase. Success criteria: 1) The data is cleansed and converted so that it is usable in the new system. 2) Only a small portion of defined data remaining outside the database that needs to be manually entered (< 1% of all MPERA data, based on record counts). 3) The converted data is reliable or the issues with the data have been documented accordingly. 4) A data dictionary will be expanded to include field usage. 5) A plan on how the data will be cleaned (this plan is driven by Ventera's data cleansing profiling results, documented within the DARR. As issues are found and discussed, MPERA will decide on a Resolution for each. That list of issues and Resolutions, stored within the DARR, becomes the plan.) 6) The data cleansing effort will identify all data issues for those data sources that are in scope for the project. 7) The data to be cleansed by MPERA, the LOB vendor and Data Cleansing vendor will be prioritized and each entity will clean as much of their prioritized list of issues as possible in the given time frame. 8) All data that is migrated will be identified and flagged as being cleansed or needing additional just in time (JIT) cleansing. 9) The data that has been cleansed will be migrated to ensure that the new LOB system will not have to rely on workarounds that are due to this cleansed and migrated data, but instead can rely on the built in automated functionality.																							
15	MPERA	Imaging - Implementation	CLS	Symons, Melanie	07/02/12	7/2/12	8/10/12	76.0%	\$207,995.71	\$159,124.91	\$0.00	\$0.00	\$412,555.00	\$0.00	\$412,555.00	\$48,658.14	23.4%	●	●	●	●	●	●

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	Agency	Title	Current Phase	Sponsor	Actual Start Date	Original End Date	Revised End Date	% of Work Completed	Total Estimated Cost		Appropriated Budget Amounts			Expended		Scope	Schedule	Budget	Risk	Overall	Indep. Verif.		
									Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other: note source in comment area	Total							Total	%
	Service Provider - Informatix IV&V - Provaliant	Agency Comments: Funding source is Pension Administration. Project was unanimously approved by the Public Employee's Retirement Board on 10/14/2010. RFP was released on 6/20/2011 and the contract awarded to Informatix Inc, on 10/17/2011. Informatix provided the required imaging software, a significant amount of the services for the project, and most of the artifacts documenting this work. Many of the delinquent artifacts became moot once laserfiche was implemented. Under an agreement reached between Informatix and MPERA the project was officially closed on 8/10/2012 for 76% of the original project cost. This covered the cost of all required software and slightly more than 50% of the services for which MPERA contracted. Success criteria: Laserfiche software is installed and imaging has commenced. 1) Laserfiche software is installed 2) Training has been delivered as specified in the Training Plan 3) MPERA staff are trained and are able to use the Laserfiche solution 4) Successful warranty completion																					
16	MPERA	Line of Business - RFP Development	CLS	Quinn, Barbara	08/01/11	4/10/12		100.0%	\$227,970.00	\$227,970.00	\$0.00	\$0.00	\$227,970.00	\$0.00	\$227,970.00	\$205,173.00	90.0%	●	●	●	●	●	●
	Service Provider - Sagitec Solutions, LLC IV&V - Provaliant	Agency Comments: Funding source is Pension Administration. Project was unanimously approved by the Public Employee's Retirement Board on 10/14/2010. MPERA awarded the contract to Sagitec Solutions, LLC in April, 2012. Completion of the activities for the LOB RFP are complete. Since Provaliant is providing oversight project management for the Line of Business implementation. 10% hold back will be paid at completion of oversight project management contract in CY2015. Success Criteria: 1) RFP requirements reflect the agency's vision and strategic plan 2) RFP with requirements that are estimated to keep the LOB vendor proposals within the allotted budget 3) RFP is clear and concise to ensure that no major requirements are missed 4) RFP development effort and vendor selection stay on schedule. 5) The selection of the best vendor for the project based on qualifications and proposal cost																					
17	MPERA	Line of Business - Implementation	DEV	Quinn, Barbara		9/5/16		5.4%	\$7,850,000.00	\$7,362,891.10	\$0.00	\$0.00	\$7,850,000.00	\$0.00	\$7,850,000.00	\$401,018.80	5.4%	●	●	●	●	●	●
	Service Provider - Sagitec Solutions, LLC IV&V - Provaliant	Agency Comments: Project was unanimously approved by the Public Employee's Retirement Board on 10/14/2010. Contract was awarded to Sagitec in April, 2012. Project kick off was held on 7/9/2012. Work is proceeding as planned, on time and within budget. MPERA and Sagitec are working to complete the first three project phases which include project management, commitment confirmation and initial infrastructure setup. The fourth phase will develop and implement the Neospin Solution software and is scheduled to begin on October 1, 2012. Success criteria: 1) Happy Customers (Members and Retirees), as Measured by... • Implemented Contact Management (Customer Care Center) • Improved Customer Service (e.g. one-and-done service, satisfaction survey, CEM metrics) • Implemented Customer Self-Service • Improved Customer Communications 2) Happy Employers, as Measured by... • Implemented Employer Self-Service • Improved Employer Service (e.g., satisfaction survey, timely and accurate contribution deposits and payroll reports) 3) Happy Staff and Management, as Measured by • Organizational Changes are Implemented • Career Growth Opportunities • Staff Retention 4) Improved Operating Efficiencies, as Measured by... • Automated Management Reporting (e.g., retirement estimates, refund processing) • Excellent system performance and response • Integrated workflow, imaging and line of business • Consistency of business processes and calculations 5) High Data Quality, Measured by... • Security • Reliability • Accessibility • Accurate Historical Data • Single, Integrated Database 6) Technology Systems Have Business Value, as Measured by... • Improved ability to efficiently & cost effectively support the new systems • Adherence to the State of Montana IT standards and policies • Implementation of Alternative IDs • Easy to Modify the System • Easy to Use the System • Reliability of the System (e.g., few bugs, high availability, accurate) • Integration with 3rd Parties (e.g., banks, insurance, other retirement systems) • Audit (Compliance, audit selection) • Information Security (e.g., secure access to sensitive information that is easily maintained, monitored and reported) • Ad Hoc Reporting (e.g., faster reports created by users) • Streamlined Workflow (e.g., using less paper and concurrent access) 7) Program Goals are Achieved, Measured by... • Completed Scope, on Schedule and within Budget • Trust Fund resources were efficiently utilized, including soft costs like staff time																					
18	MPERA	Line of Business - Hosting	DEV	Quinn, Barbara		9/5/16		2.7%	\$1,140,000.00	\$1,140,000.00	\$0.00	\$0.00	\$1,140,000.00	\$0.00	\$1,140,000.00	\$30,484.97	2.7%	●	●	●	●	●	●
	Service Provider - SITSD	Agency Comments: Funding source is Pension Administration. Project was unanimously approved by the Public Employee's Retirement Board on 10/14/2010. MPERA has contracted with Department of Administration Information Technology Services Division (SITSD) to host the Line of Business development environment at the state data center. Third Party Software and Hardware has been purchased as part of the hosting with SITSD																					
19	OPI	School Staffing	DEV	Quinlan, Madalyn	07/01/10	1/1/13		80.0%	\$400,000.00	\$400,000.00	\$400,000.00			\$400,000.00	\$345,328.27	86.3%	●	●	●	●	●	●	●
		Agency Comments:																					
20	OPI	Statewide Longitudinal Data System	DEV	Quinlan, Madalyn	07/01/10	6/30/13		70.0%	\$5,798,457.00	\$5,798,457.00			\$5,798,457.00	\$5,798,457.00	\$2,617,145.00	45.1%	●	●	●	●	●	●	●
		Agency Comments:																					
21	OPI	Direct Certification Process Improvement Project	DEV	Quinlan, Madalyn	02/06/12	12/31/13		5.0%	\$959,537.00	\$959,537.00	\$0.00		\$959,537.00	\$959,537.00	\$8,330.00	0.9%	●	●	●	●	●	●	●
		Agency Comments:																					
22	OPI	K-20 Data Project	INT	Quinlan, Madalyn	07/01/12	6/30/15		5.0%	\$4,000,000.00	\$4,000,000.00	\$0.00		\$4,000,000.00	\$4,000,000.00	\$0.00	0.0%	●	●	●	●	●	●	●
		Agency Comments:																					
23	SITSD	MBARS Upgrade	DEV	Christofferson, Paul (DOA)	7/1/2011	12/31/15		22.0%	\$1,174,300.00	\$1,174,300.00			\$1,174,300.00	\$1,174,300.00	\$585,350.00	49.8%	●	●	●	●	●	●	●
		Agency Comments: Expended to date reflects contractor Project Plan development (\$15,000), Software Site License fee (\$500,000), Escrow costs (\$350), and Development (\$70,000). Working with contractor on data conversion, gap analysis, development, and configuration.																					
24	SITSD	SITSD: Miles City Data Center (MCDC): Infrastructure build-out and occupancy	DEV	Clark, Dick	1/12/2012	12/31/12		45.0%	\$1,200,000.00	\$1,200,000.00	\$0.00	\$0.00	\$0.00	\$1,200,000.00	\$1,200,000.00	\$885,000.00	73.8%	●	●	●	●	●	●
		Agency Comments: Other Appropriate Budget Amounts: Proprietary Funding																					
25	SITSD	Public Safety Communications System	DEV	Clark, Dick	08/01/04	7/1/16	7/1/16	60.0%	\$150,000,000.00	\$121,000,000.00				\$66,399,791.00	\$66,399,791.00	\$56,067,966.00	84.4%	●	●	●	●	●	●

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No.	Agency	Title	Current Phase	Sponsor	Actual Start Date	Original End Date	Revised End Date	% of Work Completed	Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other: note source in comment area	Total	Total	%	Scope	Schedule	Budget	Risk	Overall	Indep. Verif.	
			Agency Comments: Since the last report trunking has been added to five sites (Highwood Baldy, Fox Creek, Makoshika, Fallon, and Government Hill) involving five counties (Roosevelt, Richland, Dawson, Prairie, and Custer) Eastern Montana. Cost estimates have been revised reducing the Current Estimated Cost of the Project from \$133M to \$120M. Event though the cost of the project has been reduces significantly form the original \$150M Estimate we will continue to report it YELLOW due to the risk of not being able to secure funding to complete coverage to the entire state. It should realized that what has been completed is functional and in operating today, just not builtout to all locations.																					
26	SOS	Information System Management (SIMS)	DEV	McCulloch, Linda	07/02/09	2/27/12	8/26/12	80.0%	\$5,500,000.00	\$5,132,133.00	\$1,529,181.00				\$1,529,181.00	\$1,053,748.00	68.9%	●	●	●	●	●		
			Agency Comments: Percentage of Work Completed reflects Phase I. The User Acceptance Testing timeframe is being revisited. A revised end date is being determined.																					
27	STF	Insurance Document Generation System - Phase 2	Support	Parisian, Al	07/01/11	6/30/12		98.0%	\$459,000.00	\$400,868.00				\$459,000.00	\$459,000.00	\$400,868.00	87.3%	●	●	●	●	●		
			Agency Comments:																					
Report Totals									\$294,393,441.71	\$277,781,592.64	\$30,561,202.91	\$14,100,464.00	\$107,320,246.85	\$69,558,091.00	\$221,540,004.77	\$90,008,813.89	40.6%							

Current Phase: The project's current phase: INT=Initiation, PLN=Planning, DEV=Development, IMP=Implementation, CLS=Close, HLD=Hold

Project Health Criteria

Scope: Green = features and functionality being built as designed and still within green parameters of schedule, budget and/or risk.
 Yellow = scope changes have been introduced that either (1) the impact is unknown; or, (2) cause the schedule, budget and/or risk to become Yellow.
 Red = scope changes negatively impact the schedule, budget and/or risk into Red.

Schedule: Green = Critical Path milestones are on schedule.
 Yellow = Critical Path milestone has been missed but schedule contingency exists.
 Red = Critical Path milestone has been missed and no schedule contingency exists. Or more than one Critical Path milestone has been missed.

Budget: Green = current budget estimate is within +9% of the original budget estimate.
 Yellow = current budget is exceeding the original by +10-15%
 Red = current budget estimate is exceeding the original by more than 15%.

Risk: Green = all risks have a mitigation strategy.
 Yellow = all risks do not have a mitigation strategy; however, alternatives are being discussed and/or analysis is in progress.
 Red = all risks do not have an approved mitigation strategy and have been outstanding for more the 20 business days.

Overall: Green = no more than one 1 Yellow in the other areas; no Red.
 Yellow = no more than 2 Yellow and no more than 1 Red.
 Red = 2 or more are Yellow and 1 or more are Red for more than 20 business days.