



# **QUALITY REVIEW FINDINGS REPORT**

## **ICAT**

## **PROGRAM QUALITY REVIEW III**

### **MAY 2014**

## REVISION MANAGEMENT PROCESS

### DOCUMENT INFORMATION

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## EXECUTIVE SUMMARY

As part of Central Washington's iCAT Program, CedarCrestone provides continual quality assurance services. These services include periodic Program Quality Reviews to ensure the program and individual projects meet or exceed specific project deliverables and the program stays on-track toward achieving the agreed upon scope as defined, scheduled, and budgeted. This document conveys the results of the third Program Quality Review (PQR) performed for the iCAT program between the dates of April 21, 2014 through April 25, 2014. The results conveyed within this document are based on review of program artifacts, input from project management, sponsors, functional and technical participants and reflect the general perception of individuals and their roles and responsibilities for the program.

As noted in prior PQRs, the iCAT program encompasses multiple projects and this review was targeted as a final review for projects with January 2014 go live date. The projects included in this report are Portal, Campus Solutions/HCM split, Finance Upgrade and Security Redesign. The review questions were focused to understand the activities surrounding the go live, production support since the go live as well as opportunities learned which will assist in projects currently in progress and the greater campus community.

## SUMMARY OF RESULTS

Central Washington University's iCAT Program achieved a remarkable milestone where multiple projects experienced their cutover to production at the same time. Although some areas for improvement were noted, it is worth recognizing the commendable delivery of all projects on time and the delivery of support since the go live. The university community has achieved an accomplishment where the iCAT program was positioned as a catalyst for organizational transformation and the evidence observed during this review indicate the methodology deployed, the visible and active sponsorship and individual commitment indeed contributed to the great success of the projects. The team members should be recognized for their continued outstanding commitment to the project success and delivering on their roles and

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responsibilities. Project team members are indeed fatigued, however, they have also confirmed the value of the deployments and understand the need existed to deliver the projects at this time for the university. iCAT program participants should be celebrated for their tireless efforts and commendable delivery.

## OVERALL PROGRAM STATUS

The table below summarizes the final overall status of the program.

Area	Indicator	Supporting Comments
<b>Overall Project Status</b>		<i>iCAT program delivered all reviewed projects as required.</i>
<b>Cost</b>		<i>Consulting budget continues to positively track to estimates.</i>
<b>Schedule</b>		<i>Completed projects met the scheduled deadlines.</i>
<b>Quality/Performance</b>		<i>Quality of deliverables continues to meet expectations.</i>

Table 1 Summary of Overall Status

## PROGRAM/PROJECT QUALITY REVIEW METHODOLOGY

CCI's Program/Project Quality Review (PQR) methodology is designed to ensure quality is planned for and managed throughout the program and project lifecycle. It focuses on early detection of issues and risks so that corrective action can quickly occur to mitigate risk and reduce any potential negative impact to scope. PQRs follow the standard approach listed below:

*Step 1: Identify program stakeholders and determine who will participate in the review.*

*Step 2: Collect program artifacts. Artifacts are tangible project deliverables, such as the Project Charter.*

*Step 3: Collect qualitative program data via informal on-site and telephone interviews with program stakeholders.*

*Step 4: Collect quantitative and qualitative program data via distribution and completion of an electronic survey containing questions specifically focused on the status for deliverables.*

*Step 5: Inspect project artifacts.*

*Step 6: Analyze the quantitative and qualitative data, including:*

- *Comparison of iCAT results against results of successful projects similar in scope.*
- *Comparison of iCAT program and project management deliverables against industry standards.*

*Step 7: Document and communicate the results.*

*Step 8: Establish expectations for the next review including objectives and dates.*

**NOTE:** *this step is no longer applicable for these projects.*

## OBJECTIVES FOR ICAT PROGRAM QUALITY REVIEW

This PQR focused on verifying and validating that the activities and resulting deliverables occurred as planned and required to ensure program scope was successfully achieved for each project.

- 1) Review and validate final project artifacts related to the completed projects.
- 2) Confirm that program team members fully understood and accepted their roles and responsibilities for the program and projects.
- 3) Confirm that program team members fully understood and are successfully utilized the program management methods and associated tools and techniques defined for the program.
- 4) Confirm that the program was led and supported by a sponsor who has the authority to make decisions and actively participated in the program.
- 5) Confirm that the program managers and/or program management office functioned effectively and efficiently.
- 6) Assess program and project characteristics, including technical, functional, and leadership aspects.
- 7) Identify and communicate areas of strength for the program and projects.
- 8) Identify and communicate areas of weakness for the program and present suggestions for corrective action.
- 9) Confirm the projects have been closed out.

## DETAILED FINDINGS

Detailed findings are presented in this section as they pertain to the focused objectives for this PQR. These findings are based on the data collected from interviews, electronic survey, or through analysis of artifacts. Data collected during the interviews and via the electronic survey are based on perceptions communicated by project team members. The supporting document contains the aggregated results of the survey.

### REVIEW OF PROJECT DELIVERABLES

The following table contains analysis results for the expected deliverables at this point in the program lifecycle. Deliverable artifacts were obtained from the CCI project manager and deliverable artifacts were analyzed to verify and validate that each met the expected results.

#	Deliverable	Observation
1	Project Charter also known as the Project Management Plan (PMP)	<p><u>PQR I</u>: The MS Word document is comprehensive and meets industry standards for a Project Management Plan. Contains project justification, vision, mission, goals and guiding principles. Provides framework for management of cost, schedule and performance and establishes the expectations for issue and risk management.</p> <p><u>PQR II</u>: Each project has developed an MS Word document to provide guiding principles and framework.</p> <p><u>PQR III</u>: No further review required.</p>
2	Report of Fit Gap Findings	<p><u>PQR I</u>: MS Word documents designed to convey the results of Fit Gap sessions. Each report conveys high-level findings and direction. Travel Authorization project was able to move forward to Build stage in PS while Faculty Workload project was able to produce a RFP.</p> <p><u>PQR II</u>: MS Word documents for individual projects continue to provide results of findings and direction.</p> <p><u>PQR III</u>: No further review required.</p>

3	Change Management Plan	<p><u>PQR I:</u> MS Word document conveys the institution’s plan for managing change that is imposed by the project. The document is structured in a manner that meets industry standards – it clearly conveys information required by the project community as it prepares for the change. It is designed to help the audience evolve through the life of the project.</p> <p><u>PQR II:</u> MS Word document outlines the overall plan for Change Management with timeline as well as audience for communication.</p> <p><u>PQR III:</u> No further review required.</p>
4	Communication Matrix	<p><u>PQR I:</u> MS Word documents containing specific communication requirements per audience type. The document is a work-in-progress that is being maintained by the project management team.</p> <p><u>PQR II:</u> MS Word document is updated continually for each project and provide detailed communication efforts.</p> <p><u>PQR III:</u> MS Word document for Portal communication plan was reviewed and adequately identifies stakeholders, responsible owner, communication vehicle and frequency. It also contains area for feedback loop tracking.</p>
5	Project Status Report(s)	<p><u>PQR I:</u> MS Word documents at the project level and at the program level. The program level document contains rolled-up information to convey current status toward achieving program scope. Contains status by section: Overall Status, Scope, Budget and Schedule. In addition, the status also addresses areas of Milestone/Deliverable, Risk Management, Key Accomplishments, Upcoming Activities and Issue identification and mitigation.</p>

		<p><u>PQR II</u>: MS Word documents continue to include all required elements validated in previous review.</p> <p><u>PQR III</u>: MS Word documents continue to include all required elements validated in previous review.</p>
6	Project Schedule	<p><u>PQR I</u>: MS Project files containing work breakdown structure of three to four levels for each project within the iCAT program.</p> <p><u>PQR II</u>: MS Project file continues to include all required elements validated in previous review.</p> <p><u>PQR III</u>: MS Project file continues to include all required elements validated in previous review.</p>
7	Meeting Agendas and Notes	<p><u>PQR I</u>: MS Word documents from multiple Planning Meetings – validated that standard format and content expectations for meeting management/documentation are achieved.</p> <p><u>PQR II</u>: MS Word document continues to include all required elements validated in previous review.</p> <p><u>PQR III</u>: MS Word document continues to include all required elements validated in previous review.</p>
8	System Design Document	<p><u>PQR I</u>: For the On Line Travel Authorization workflow which will be built within PeopleSoft, a Preliminary Systems Design Document was reviewed and meets industry expectations.</p> <p><u>PQR II</u>: MS Word document continues to include all required elements validated in previous review.</p> <p><u>PQR III</u>: Not required for this PQR.</p>
9	Business Process Guide	<p><u>PQR II</u>: MS Word document includes all steps required for a business process function as a result of a project implementation.</p>

		<p><u>PQRIII</u>: MS Word documents reviewed meet expectations to provide good documentation of system usage.</p>
10	Configuration Guide	<p><u>PQRII</u>: MS Word document includes all configuration pages required for each process.</p> <p><u>PQRIII</u>: Not required for this review.</p>
11	Deployment Plan	<p><u>PQRII</u>: MS Excel document indicates dates, technical and functional steps as well as owners required to migrate to production.</p> <p><u>PQRIII</u>: All Go live/Deployment plans were well updated with owners, timing and dates of activity and task status.</p>
12	Change Control	<p><u>PQRII</u>: MS Word document indicates the change request, justification, updated timeline and budget for the change.</p> <p><u>PQRIII</u>: Not Required for this review.</p>
13	Security Plan	<p><u>PQRII</u>: MS Excel document includes users, permission lists and roles required for new functionality.</p> <p><u>PQRIII</u>: Security was included into the activities for go live and addressed individual required tasks.</p>
14	Training Plan	<p><u>PQRII</u>: MS Word document indicates the mission, methodology and goals for training users on new functionality.</p> <p><u>PQRIII</u>: Detailed Training plan included overall goals as well as identified session task list and overall activities.</p>
15	Training Guides	<p><u>PQRII</u>: MS Word or pdf documents include step by step instruction on new functionality.</p> <p><u>PQRIII</u>: Training Guides reviewed continue to provide the information in a step by step required for a through training.</p>

**Table 2 Deliverables Expected To This Point in the Project Lifecycle**

### ASSESSMENT OF CENTRAL WASHINGTON UNIVERSITY'S PROGRAM CHARACTERISTICS

Successful programs and projects possess distinguishing characteristics. In the table below, again we compare observations of the Central Washington's program and projects against distinguishing characteristics of successful projects similar to the size and scope of Central Washington. Comparisons are rated in the manner described below:

- 4 – Strength: Observed and occurring in a manner that exceeds expectations
- 3 – Positively Confirmed: Observed and occurring as expected
- 2 – Negative: Observed to some extent but not occurring as expected at the time of this PQR
- 1 –Weakness: Did not observe / did not exist at time of this PQR

#	Successful Characteristics or Observations	PQR I Rating	PQR II Rating	PQR III Rating	Comments
1	A program management organization is in place and project management methods, procedures, tools & techniques are in place to ensure program integration occurs throughout the implementation lifecycle.	3	3+	3+	<p><u>PQR I</u>: The program management team is established and has developed program and project management processes, tools &amp; techniques to address the needs for monitoring and controlling the project throughout its lifecycle.</p> <p><u>PQR II</u>: The program management team continues to utilize tools and techniques, procedures and methods extremely well. Program participants have indicated the willingness of the program management team to go above and beyond required duties to ensure successful completion of projects.</p> <p><u>PQR III</u>: The program management team deployed all tools, techniques, templates effectively throughout the lifecycle of the implementation. The successful go lives experienced are proof of this organization's skills and utilization.</p>

2	An executive sponsor from the top leadership of the institution with the authority, time, and commitment to support a team and champion the program exists and is actively engaged in the program.	3	3+	4	<p><u>PQR I:</u> The executive sponsors are very engaged and committed to the success of the program. In addition, a new program director has been appointed.</p> <p><u>PQR II:</u> The executive sponsors of iCAT continue to be very active and well engaged. With the addition of a new program director, iCAT has benefited from clear guidance and change to team dynamics has been observed.</p> <p><u>PQR III:</u> The executive sponsors of the iCAT program delivered above and beyond their required roles and responsibility to ensure the success of these projects. This reviewer has not observed this level of commitment and involvement in other projects as those occurred for iCAT.</p>
3	A program quality management plan (PQMP) is in place and being deployed to assure quality.	3	3	3	<p><u>PQR I:</u> A comprehensive PQMP exists and is being executed as designed.</p> <p><u>PQR II:</u> PQMP continue to be executed as designed.</p> <p><u>PQR III:</u> PQMP was executed well to deliver successful projects.</p>
4	A tool is available for effectively and efficiently managing (i.e., tracking, storing, accessing, updating) program documentation.	3	3	3+	<p><u>PQR I:</u> Standard tools and templates exist and have been deployed for managing program documentation.</p> <p><u>PQR II:</u> The tools continue to exist for effective program management.</p> <p><u>PQR III:</u> Project documentations were effectively managed throughout the project.</p>
5	Team members have the facilities required to attend meetings and actively participate.	3	3	3+	<p><u>PQR I:</u> Interview participants confirmed of adequate facilities exist to perform their tasks.</p> <p><u>PQR II:</u> Participants continued affirmation of facilities to meet their needs.</p> <p><u>PQR III:</u> Participants indeed had facilities required to go live for their projects. It was noted during the interviews that additional locations were established to handle triaging of go live issues.</p>
6	The technical infrastructure required to design and develop the	3	3	3	<p><u>PQR I:</u> The technical infrastructure required has been established.</p> <p><u>PQR II:</u> No additional review required.</p>

	system is in place and functioning as required to stay on-schedule.				PQR III: Although no additional review was required, the university did experience a technical infrastructure change around the project go live activities of iCAT. Community did experience some issues with infrastructure, however, the team was able to respond with mitigating activities.
7	Meeting minutes are created and contain information about topics discussed and decisions, issues, tasks, and risks identified and assigned during the meeting.	3	3	3	PQR I: Meeting minutes are being created in an effective and efficient manner. PQR II: Meeting minutes continue as an effective tool. PQR III: Meeting minutes continued to serve as a good resource for project activities, status and issues to go live.
8	Meeting agendas are created and distributed early enough to allow participants to prepare	3	3	3	PQR I: The templates and standards for meeting agendas are designed, developed, deployed and operating as required. PQR II: Meeting agendas continue as an effective tool. PQR III: Continued effective tool as prior review results.
9	Program participants accept responsibility and accountability for their assignment and associated deliverables.	3	3	4	PQR I: Interview participants conveyed their understanding of responsibility and accountability for their assigned roles and responsibilities. PQR II: Program participants continue to convey their understanding of roles and responsibilities and their commitment. PQR III: Without a doubt, the program's participant tenacity and acceptance of their roles and responsibilities to deliver a successful project was a large factor in these project's go lives.
10	Program participants feel they have the tools and associated techniques to perform what is required of them.	3	3	3	PQR I: Interview participants positively confirmed they have the tools and techniques required for their project. PQR II: In general, program participants confirmed they have the tools and techniques required. A few have expressed they would like to receive additional training.

					<p><u>PQR III:</u> Although the participants experienced challenges due to infrastructure updates, the participants were able to work through the issues and deliver their projects in a timely manner.</p>
11	Scope is verified and validated.	3	3	3	<p><u>PQR I:</u> Scope, as addressed to this point in the program, is defined and communicated to all stakeholders. Individuals were able to articulate scope when asked during the interview sessions.</p> <p><u>PQR II:</u> Scope continues to be validated and verified for each new project. If a change is required, a change order is utilized.</p> <p><u>PQR III:</u> No further review required.</p>
12	A method and procedures for controlling changes to project scope is embraced by the entire program community and effectively deployed.	3	3	3	<p><u>PQR I:</u> The methods, procedures and tools for issue management are designed, developed and deployed to effectively and efficiently manage issues for the program and its projects.</p> <p><u>PQR II:</u> Change order template is well established and utilized; such was the case for changes to cApps project.</p> <p><u>PQR III:</u> No further review required.</p>
13	Team dynamics are positive – program participants have formed well working relationships that will aid in the teams achieving their deliverables.	2	3	3+	<p><u>PQR I:</u> iCAT is negatively affected by historical relationship between technical and functional groups.</p> <p><u>PQR II:</u> Team dynamics is much improved and positive, observable changes were evident during this PQR.</p> <p><u>PQR III:</u> Cultural transformations requires tenacity and time and although this work continues, CWU has experienced a significant positive shift in team dynamics. This review observed participants working together to alleviate issues in more open, dynamic and professional manner.</p>
14	A mechanism for effectively and efficiently communicating program performance is in-place.	3	3	3	<p><u>PQR I:</u> iCAT program is utilizing established and accepted tools and techniques for delivering reliable and acceptable performance reporting.</p> <p><u>PQR II:</u> Program continues to utilize established tools and techniques for performance delivery.</p>

					PQR III: No negative changes observed since prior review.
15	The leadership team includes both academic and administrative representation	3	3+	3+	<p>PQR I: The program leadership team includes both academic and administrative representation.</p> <p>PQR II: Program leadership continues to be active, strong and contains good representation of the community.</p> <p>PQR III: No observable changes since last review.</p>
16	Leadership understands the scope of the program	3	3+	4	<p>PQR I: Leadership's understanding of the program scope is outstanding. Without exception, the leaders who were interviewed conveyed their commitment.</p> <p>PQR II: Program leadership's understanding of scope continues to be outstanding.</p> <p>PQR III: Program's leadership ensured the scope was enforced and projects were delivered.</p>
17	A Program Management Plan and/or Program Charter exists and is utilized by the team to guide their actions for the project	3	3	3	<p>PQR I: Each project has either completed or in process of completing a comprehensive plan which conveys information required by the project team and should serve the projects and the iCAT program well.</p> <p>PQR II: A completed plan or charter exist for each project and provides the structure and guidance for high-quality progression.</p> <p>PQR III: The PMP / Charter has effectively guided the project's direction and vision.</p>
18	Status toward achievement of scope is monitored on a regular basis	3	3	3	<p>PQR I: To this point in the program, the project management team is exceptionally managing and monitoring the scope.</p> <p>PQR II: Project management team continues a remarkable task of monitoring scope.</p> <p>PQR III: Project team has well managed the status toward scope and has delivered now 10 of 12 original projects within iCAT program.</p>

19	A mechanism for identifying, tracking and communicating project tasks, deliverables and milestones exists and is understood by the entire program community.	3	3	3	<p><u>PQR I</u>: The observed artifacts contained the expected characteristics of well-defined projects which will serve the iCAT program well.</p> <p><u>PQR II</u>: Status updates used by each project convey the project milestones and deliverables to the program community.</p> <p><u>PQR III</u>: Status documents and meetings have served the project team well in understanding and communicating deliverables and milestones.</p>
20	A mechanism for identifying, communicating, tracking and escalating issues is in place and understood by the entire program community	3	3	3	<p><u>PQR I</u>: The methods, procedures and tools for issue management are designed, developed and deployed to effectively and efficiently manage issues for the program and its projects.</p> <p><u>PQR II</u>: Program participants confirmed their positive understanding of issues tracking and escalating procedures.</p> <p><u>PQR III</u>: Project teams utilized the issues log effectively for continued mitigation actions.</p>
21	A mechanism for identifying, qualifying, quantifying, communicating, tracking and mitigating risk is in place and understood by the entire program community	3	3	3	<p><u>PQR I</u>: The methods, procedures and tools for risk management are designed, developed and deployed to effectively and efficiently manage issues for the program and its projects.</p> <p><u>PQR II</u>: Mechanism for risk management is deployed and serving the community well.</p> <p><u>PQR III</u>: Similar to issues, risks were tracked appropriately throughout the lifecycle of the projects.</p>
22	An escalation process with associated decision process is formalized and utilized	3	3	3+	<p><u>PQR I</u>: Escalation procedures with associated decision processes are defined for the program. Interview participants voiced their commitment to working through issues so few items would require escalation outside of the work group.</p> <p><u>PQR II</u>: Positively confirmed the escalation process is working as defined.</p> <p><u>PQR III</u>: Given the entire team as well as the project sponsors were directly involved in the status meetings, the issues were identified and mitigated quickly.</p>

23	Projects are appropriately staffed to achieve completion of the planned scope	3	3	3	<p><u>PQR I:</u> Program is staffed appropriately, however, many positions have not been backfilled and some participants are the single point of knowledge for the project and business area.</p> <p><u>PQR II:</u> Program continues to encounter and manage the challenge of single point of knowledge and resources over-lapping across multiple projects.</p> <p><u>PQR III:</u> The projects within iCAT program were challenged with tight and overlapping staffing. However, every project thus far have been able to successfully go-live despite the staffing overlap.</p>
24	Project team members understand their roles and responsibilities and feel empowered to successfully perform	3	3	3+	<p><u>PQR I:</u> Interview participants positively conveyed their understanding of their role and commitment to the program and feel empowered to perform their role.</p> <p><u>PQR II:</u> Participants confirmed their understanding of roles and responsibilities for the program and do feel empowered to complete their tasks.</p> <p><u>PQR III:</u> Participants very well understood and felt empowered throughout the project to deliver successful go lives.</p>
25	A Communication Management Plan is established and individuals impacted by the project are receiving information that is appropriate and timely	3	3	3	<p><u>PQR I:</u> Positively observed each project manager is performing a good job of communication for projects and iCAT program.</p> <p><u>PQR II:</u> Communication Management Plan is established and utilized. A program communication agent has been established.</p> <p><u>PQR III:</u> Communication efforts were well organized and executed for the success of the projects.</p>
26	An Organizational Change Management (OCM) Plan is established and tasks are progressing toward successful achievement of the Plan	2	2+	3	<p><u>PQR I:</u> Change Management assessment was conducted for iCAT; however, full utilization of plan has not occurred.</p> <p><u>PQR II:</u> Change agent has been established for the program and further utilization of CMP would benefit CWU.</p> <p><u>PQR III:</u> Change manager has been involved much more in the projects and the increased embracement rate of the</p>

					community is proof of the worthwhile change efforts.
27	Standards for modification and/or customization and development are established, understood by the team members who are responsible for performing tasks, and are being deployed to successfully complete tasks.	3	3	3	<p><u>PQR I:</u> Standard templates are utilized by team members.</p> <p><u>PQR II:</u> Continued usage of standard templates was observed.</p> <p><u>PQR III:</u> No deviations were noted from prior reviews.</p>
28	A clear post go live sustainment model is in place and understood by university community		2	3	<p><u>PQR II:</u> (Added Item)                      Participants were able to convey intrinsically understood procedure; however, a clearly defined and documented model does not exist for CWU.</p> <p><u>PQR III:</u> A very well thought support network was established for the initial cutover of the projects. Since then, additional activities have begun to create a complete sustainment model for the university community. Finalizing the full model will serve the university community well into the future.</p>
29	Establishment of Project Management Office (PMO) and project methodology for university community			3+	<p><u>PQR III:</u> New Item                      CWU has gone above the required elements of a good project and program by starting the work of establishing a PMO. The university has determined the position in the organizational chart and tools which will be utilized by this office. Continued work in formalizing this office by establishing a charter, clearly defining roles and responsibilities, budgeting and project methodologies will ensure continued delivery of successful implementations.</p>

**Table 3 Distinguishing Characteristics of a Project - Comparison**

## PROGRAM / PROJECT STRENGTHS

Project strengths can greatly influence positive project results and the following strengths reflect a few justifications for successful deployment of the projects within the iCAT program.

- 1) **Remarkably committed project team members.** The iCAT program selected project participants who were remarkably committed to the successful completion of projects and were highly motivated to deliver a quality product. Although these members were fatigued by an ambitious timeline and overlapping job deliverable, they none the less continued to deliver above and beyond the norm.
- 2) **Highly Effective Project Management Team.** Throughout the iCAT program, the program fully realized a Project Management team with exceptional commitment to the program's success. Their organization skills and aptitude of delivering the standard project tools, techniques and templates positively influence the successful deployments. The team was able to lead their members in a focused approach is noted.
- 3) **Executive Leadership.** Studies have supported an active and engaged sponsor can significantly influence a project. The iCAT program has solidly confirmed these studies are indeed correct and the successful implementations of the projects within the iCAT program are the result. This reviewer has yet to see projects which was solidly supported by sponsors who were as diligent and guiding as this program. The continued commitment from the sponsors have been remarkable and should be used as an example for all upcoming projects CWU wishes to endeavor. It is also noteworthy of the unanimous affirmation by the project participants of the remarkable sponsorship.
- 4) **Embracement of Transformation.** CWU is indeed experiencing a cultural shift in that transformation on campus is occurring to embrace new ideas, greater community involvement such as focus groups, more effective training and open communications as a result of these deployments. The iCAT program has achieved a great goal of being the catalyst of change for organizational transformation effort and will continue to serve as a good example to the greater community. Although the transformation has not occurred universally and pockets of resistance continue to exist, great progress has been observed.

## OPPORTUNITIES FOR ADDITIONAL PROJECTS AND CAMPUS COMMUNITY

Realizing improvement opportunities for the greater community and future projects can directly and positively impact the continued transformational effort. To that end, the following activities are recommended:

- **Establish a stabilization period:** Given that several major projects have gone live during the same period, there is considerable fatigue among project participants. Several of these participants are the same resources who began the program two years ago. For those participants who are not actively engaged in the remaining projects, a down-time is recommended. The time allowed can be utilized to ensure there is alignment of documentation to the actual processing steps in production, review new functionality that may not have been deployed or within original scope and finally to allow the participants to recharge, realize and celebrate the accomplishments of a successful deployment.
- **Review accomplishments and opportunities of iCAT Program:** iCAT program has deployed successfully a large number of projects as well as experienced a few opportunities for improvement. To that end, ensure the greater campus community as well as members of the Board of Trustees understand the remarkable accomplishments reached thus far by comparing the list of projects originally planned within iCAT program against those that have been successfully delivered. In addition, circle back to the focus groups and ensure the projects delivered originally planned scope so the projects can be effectively closed out using this meeting as the last activity. Lastly, share with the greater community of the challenges the program encountered and the lessons learned that are applied to other projects.
- **Continue work on sustainment model:** As mentioned in prior reviews, a formalized sustainment model is recommended for CWU to fully realize self-sufficiency of system users. An issues reporting system as well as a sustainment model will ensure the university community understands their roles and responsibilities for continuous

support of the systems implemented. The excellent work accomplished during the project should not be negated by a lack of a fully realized support system. The support network will need to include continuous training and communication efforts to ensure the continuity of campus wide transformational activities.

- **Establishment of the Project Management Office (PMO).** Activities since the last review indicate the university's desire to establish a PMO. By officially establishing a PMO, the university is committing to a new methodology of delivery for every project. To guarantee a successful establishment of a PMO, clearly indicate within the university organization as to the position of this office. The office should develop a charter to not only establish the office, but to clearly indicate roles, responsibilities and expectations of stakeholders, identify budget requirements, system and methodology that will be deployed on projects and which projects this office will control.

## SUMMARY

The results of this Program Quality Review indicate Central Washington's iCAT program has deployed many successes since the last review. The program continues to lead the effort in organizational transformation for Central Washington University and is a good example for deployment in all areas of the university. The greatest strength observed throughout the lifecycle of these projects has been the level of dedication of the project participants and their commitment to not only deliver their projects on time and within scope, but to embrace the transformational efforts utilized within the project and these efforts serve as a role model to the rest of the university community. The direct project participants as well as the university community is to be commended for their diligence, patience and continued effort in cultural transformation where changes are embraced, continued evaluation of leading practices are encouraged and always questioning whether processes could be updated to better serve the greater community. Indeed, this program has allowed the community to work more collaboratively and cohesively than ever before realized. With this report, these projects are deemed a success and ready for movement from project status to operational mode.

## APPENDIX:

### INTERVIEW SESSIONS

In person interview session schedule at Central Washington.

Project	Role/Group	Date	Time	Location
CCI PM	CCI PM	04/21/14	8:00 - 9:00 a.m.	SURC 202
Security Redesign	Security Office	04/21/14	9:00 - 9:45 a.m.	SURC 202
FMS 9.2 Upgrade	Sponsor	04/21/14	11:30 a.m. - Noon	SURC 202
Portal/HCM 9.2 Upgrade/Split	Sponsor	04/21/14	1:00 - 2:00	SURC 202
FMS 9.2 Upgrade	Team	04/21/14	2:00 - 3:00 p.m.	SURC 202
Campus Split Project	Team	04/21/14	3:00 - 4:00 p.m.	SURC 202
Security Redesign	iCAT Security Project	04/21/14	4:00 - 4:30 p.m.	SURC 202
Information Services Management	CWU IS Team	04/21/14	4:30 - 5:00 p.m.	SURC 202
iCAT CWU Project Management	Team	04/22/14	8:00 - 8:30 a.m.	SURC 202
iCAT Training	Trainer	04/22/14	8:30 - 9:00 a.m.	SURC 202
HCM 9.2 Upgrade	Team	04/22/14	9:00 - 10:00 a.m.	SURC 202
Security Redesign	HR Workgroup	04/22/14	10:00 - 10:30 a.m.	SURC 202
Security Redesign	CS Workgroup	04/22/14	10:30 - 11:00 a.m.	SURC 202
Security Redesign	FS Workgroup	04/22/14	11:00 - 11:30 a.m.	SURC 202
MyCWU Portal	Team	04/22/14	1:00 - 2:00	SURC 202
iCAT Program	iCAT Project Leadership	04/22/14	2:30 - 3:30 p.m.	Barge 305

### PQR SURVEY RESULTS

A result of PQRIII Survey is transmitted separately with this report.