Manitoba Public Insurance

Project Closeout Report

HTA 279.1 and Bill 25 2728/2747

This report has been prepared as advice, opinions, proposals, recommendations, analyses or policy options developed by or for the public body or a minister, as per Section 23(1) of the Freedom of Information and Protection of Privacy Act.

Project Manager: Marc Baldwin

Version: 1.0

Date: February 16, 2018

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1 Revision History

Date	Document Version	Description of changes	Author
Feb. 16, 2018	1.0	Initial draft	Marc Baldwin

2 Purpose

The Project Closeout Report evaluates how well the project performed against the original plan. The purpose of this document is to define and provide links and attached documentation required at project closeout should an audit be performed.

The audience for the Project Closeout Report includes:

- The BTO Management Team
- Potential Auditors (both internal and external)

Information within the closeout report will be leveraged for post project audits, and therefore must be included within this document as attachments, embedded documents, or links to the location of the source documents.

3 Project Description

There were two broad component of this project:

a) Bill 25 – The Cannabis Harm Prevention Act

In the spring of 2017, the Government of Canada introduced legislation to legalize and regulate cannabis on July 1, 2018. To reduce the risk of drug impaired driving and the harm it poses to public safety in Manitoba in the interim, the provincial government tabled Bill 25, The Cannabis Harm Prevention Act. The bill created the following changes that are relevant to the Corporation:

- Improved police authority with respect to the detection of drug impairment without the need for testing
- The introduction of a new 24-hour driver's licence suspension to take cannabis-impaired drivers off the road.
- Two new Highway Traffic Act and Off Road Vehicle Act convictions concerning:
  - Limits on the transportation of cannabis in road and off road vehicles.
  - A complete ban on the consumption of cannabis in road and off road vehicles

Drivers that receive the 24-hour suspension will be handled in one of two ways:

1. Experienced drivers will receive a 24-hour suspension as a sanction.
   o The suspension will have no impacts to their driver record, driving safety record and there is no change in penalty for repeat offenders.
   o MPI will, however, track offences for statistical purposes.
2. Non-experienced drivers (including GDL licence-holders, authorized drivers, and history drivers) that receive the 24-hour suspension will be reported to the registrar.
   o The suspension will be applied to the driving record.
   o This offence may trigger an automatic driver improvement action modelled on the violation for zero blood-alcohol content.

Convictions around the transportation and consumption of marijuana in road and off road vehicles followed existing liquor-related policies, procedures, and penalties.

b) Changes to the Highway Traffic Act, Section 279.1

In 2013, two new offences - HTA 279.1(5) and HTA 279.1(5.1) - were added to the Highway Traffic Act concerning drivers operating vehicles without a required ignition interlock device. The amendments clarified that police can impound a vehicle if a driver is caught operating it without a required, functioning ignition interlock device. The charges also stipulated that a driver face 10 demerits and an automatic show cause hearing if convicted. The offences were added to the DSR, DLS and DI and C systems.

4   Project Objectives:

a) Bill 25 – The Cannabis Harm Prevention Act

The project introduced:
- A new 24 hour suspension code.
- Two new convictions related to the transportation and consumption of cannabis in road and off road vehicles
- A new roadside law enforcement form and associated training material to support the new 24 hour suspension
- Policy and procedure updates to support these changes
- Updates to High School Drivers Ed program material
- Customer communications in partnership with Manitoba Justice

b) HTA 279.1 Changes

The project made the following changes:

- DSR changes to incorporate two new offences:
  o 279.1(5) & 279.1(5.1)

- DI and C changes are required to move two existing offences from a 0 to 5 severity level:
  - 297.1(2) & 279.1(3)

5   Scope of Work:

a) *Bill 25 – The Cannabis Harm Prevention Act*

- System Changes:
  - § Introduction of new 24hr suspension code impacts:
  - § Driver Improvement and Control (DI and C)
  - § Driver Licensing System (DLS)
  - § DLS Transaction Entry (DTE)
  - § Driver Safety Rating (DSR)
  - § DSR Calculator
  - § Autopac On-Line (AOL)
  - § Support for the Conviction Equivalency Table (CET)
  - § Support for the Inter-provincial Record Exchange (IRE)

- Administrative Changes:
  - § Updates to KnowledgeNet and policy documents
  - § KnowledgeNet – Passenger Vehicle Registration Wizard
  - § Any training to support the new suspension
  - § Updates to High School Driver Education material

- Regulatory Changes:
  - § Determined in consultation with the Registrar and Department of Justice

- Communication Tasks:
  - § Communication strategy
  - § Creation of a new 24 hour suspension form - to be handled directly with the business. Printing and shipment of new forms to Law Enforcement agencies.
  - § Develop MPI staff communications
  - § Review and update all documentation and publications, including internal and external websites that are impacted by the change

b) *HTA 279.1 Changes*

- System Changes:
  - § Driver Safety Rating (DSR)
  - § Driver Safety Rating Calculator
  - § Driver Licensing System (DLS)
  - § Driver Improvement and Control (DI and C)

- DLS Transaction Entry (DTE)
- Autopac Online (AOL)
  - Administrative Changes:
    - None
  - Regulatory Changes:
    - None
  - Communication Tasks:
    - Develop MPI staff and broker communications
    - Review and update any documentation and publications that are impacted by the change

c) Scope of Work Delivered/Excluded

- ESS19724 was not in the scope of this project.

d) Outstanding Defects or Issues
There are no outstanding defects or issues stemming from this project.

6   Planned vs. Delivered Milestones

Major Project Milestones	Group Responsible	Milestone End Date	Actual Date
Project Charter Approved	BTO Management	May 5, 2017	May 19, 2017
Project Plan Approved	BTO Management	June 23	October 6
Business Requirements Document Complete	BRM and Business Representatives	July 7	July 18
System Use Cases Complete	Project Team	August 3	July 30
Build Start	Project Team	July 31	July 31
Deliver new suspension form	Business	August 4	August 4
Build Finish	Project Team	September 15	September 15
System Integration Testing Start	Project Team	September 18	September 29
System Integration Finish	Project Team	September 29	October 22
User Acceptance Testing Start	Quality Metrics and Control, Business Team	October 2	October 23
User Acceptance Testing Finish	Quality Metrics and Control, Business Team	November 10	November 17
Implementation	Project Team	November 19	November 19

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Major Project Milestones	Group Responsible	Milestone End Date	Actual Date
Warranty Complete	Project Team	December 8	January 26, 2018

7 Project Financials

The following is a summary of the financial history of the project.

Fiscal Year	2017~~6~~-2018~~7~~
Statement of Work/Insertion of Work	Insertion 3
Corporate Intake Request #	n/a
Project Code(s)	2728, 2747
Project Code(s) Closed (Y/N)	Y
If no, please provide explanation	
Original Approved Estimates (No budget for insertion of works)~~Budget~~	$460,000
Change Requests: CR_____	$0
Decision Requests:_ DR_____	$0
Project Forecast Cost (Not verifiable through EPMS monthly forecasting)	$462,495
Life to Date Actuals	$237,247
Variance to Current Budget	$(222,753)
Variance to Original Budget	$(222,753)

8 Schedule and Budget Report

The following highlights variances between estimated and actual effort (hours) and budget (dollars) required for each stream within the project.

Budget by Project Streams	Estimated (Hours)	Revised (Hours)	Actual (Hours)	Variance %
Business Analysis	704	n/a	396.34	307.66
Development	1,439	n/a	925	514
System Analysis	684	n/a	431.25	252.75
Technical and Data Architecture	448	n/a	106.25	341.75
UAT[1]	1,782	n/a	111.75	1670.25
Change Mangement	258.5	n/a	10	248.5
Knowledge Management / Communications	340	n/a	15.75	324.25
Project Management	620	n/a	618	2

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[1] Note – acceptance testing was completed by business unit subject matter experts, who did not count their effort in Time Card.

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Budget by Project Streams	Estimated (Hours)	Revised (Hours)	Actual (Hours)	Variance %
TOTAL(s)	6,275.5		2,614.34	3661.16

9   Resource Management Summary

Question	Response
A Staffing Plan was documented and defined the roles and responsibilities of staff on the project?	Yes
How many resource requests submitted during the project?	25
Were the resource requests filled satisfactorily and within a timely manner? If no, please identify or explain laps in resource fulfillment.	Yes
Were the resources provided the correct resources based on the requests submitted? If no, please identify or explain.	Yes
Overall, please provide a summary for the project resourcing as it relates to the success for the project delivery.	The assignments were timely and the assigned resources met their tasks.

10 Lessons Learned Recommendations and Assignments

This section is intended to help apply the lessons learned by incorporating them into process(s). Provide a summary of lessons learned gathered from the project. Identify key suggestions and recommendations which may assist future project from experiencing similar problems.

ID	Title	Description	Lessons Category
1	DSR Verbiage	BTO recommends descriptions for the DSR calculator. BTO to work with KMS to wordsmith the legislation.	Scope
2	Software Installations	We were unable to get software installed on resource workstations in time for Business Acceptance Testing. Because we had a long wait time for installations we attempted to install software on some workstations ourselves and configure for testing. In some cases we were unable to do this so developer workstations were shared for testing. Installation requests should be made sooner. Perhaps there should be a task added at the start of the project to identify software needs for all team members. Installations and security requests should be tracked in one place.	Schedule

ID	Title	Description	Lessons Category
3	Batch Testing	Batch dependencies had to be investigated for many steps. Maybe there should be documentation for this. When testing needs to be done for a project it can be used to determine steps and dependencies. This is better than using SMEs who have all the knowledge themselves.	Schedule
4	Test Scenarios	Due to nuances and 'one-off' cases, some of our scenarios needed to be modified. We created many scenarios in a short period of time and there may have been some miscommunication on the steps required to test and the expected outcomes. Take more time to carefully go through each scenario with the business.	Schedule
5	Business Testing	The business testers would benefit from having defined test steps and expected outcome(s) for each scenario. Perhaps a rehearsal of a few scenarios to be sure expectations are understood. This could apply to any IT resources involved in the testing as well.	Resources
6	Conviction Ref data in many systems	It takes time to identify what systems are involved and what changes are required for each. This is mostly due to the fact that only the SMEs have this information. Document the technical work involved when modifying conviction ref data.	Resources

11 Appendix A –PIR Recommendation Checklist

This following chart contains a sample checklist of recommended items that will help to improve the probability of success for any project and provide a solid foundation to assist the project manager in preparing for a PIR. **Below are only examples of questions for some of the evaluation areas.**

Questions:
Business Case & Vision Planning
Do you have a Business Case that includes the following information? No – legislative requirement to update systems.
Description of why the proposed system is an appropriate investment
An overall Timeline with Milestones
Definition of Primary goals of the system
An estimated budget
Do you have a Vision Document that describes how the project supports the mission of MPI? No
Risks & Risk Mitigation
Do you have a Risk Management Plan? Yes
Do you have a mechanism for documenting risks as they occur? Yes
Cost
Do you have a written budget plan that includes the following elements? Yes
Clearly stated baseline cost goals
Assignment of budget responsibilities
Have you defined a method to record expenditures? Yes
Do you have a cost revision documentation and a change approval process? Yes
Schedule
Do you have an original project schedule that includes the following elements? Yes

Questions:	
Specific milestones	
Clearly defined durations for each implementation phase	
Development tasks clearly assigned to specific phases of the effort	
Mechanism for identifying assigned / responsible personnel	
Do you have a change tracking mechanism? Yes	
Customer & User Satisfaction	
Are the customers and users of the specific system clearly defined? Yes	
Are clear goals defined for each kind of customer or user? Yes	
Project Lessons Learned	
Is there a mechanism to collect lessons learned that includes the following elements: Yes	
Accessibility by all project personnel	
Standardized submission format	
Ability to submit throughout all phases of the project	

12 Appendix B –Documents Required to Support PIR(s)

Below is a list of typical project documentation that can be used to support PIRs. Any other relevant documents that are available should be provided to the evaluation team for inclusion into the PIR.

The list below links to the appropriate deliverables.

Business Case and Vision Planning
- Business Case – n/a, not a deliverable
- Project Charter
- Project Plan
- Business Architecture Document – n/a, not a deliverable

Scope Management
- Requirements Document: HTA and Bill 25
- Requirements Traceability Matrix – n/a, not a deliverable
- Functional Specification – see the System Use Cases under Technial/Use Cases
- Assumption Documents
- Change Requests – n/a, no change requests
- Decision Requests – DR001

Risks and Risk Mitigation
- Risk Log
  - o Risk Assessment
  - o Risk Summary
- Status Reports – see the weekly project status reports under Admin/Project Reporting

Project Communication
- Project Plan
- Meeting Minutes - see the meeting notes under Admin/Meeting Minutes
- Status Reports – see the weekly project status reports under Admin/Project Reporting
- Project Presentations – see the presentation slide decks under Admin/Project Reporting

Cost Management
- Original Budget
- Final Budget
- Invoices – n/a
- Cost Change Requests – n/a, there were no cost changes

Schedule Management
- Original Project Schedule
- Final Project Schedule
- Milestone Reports – see the weekly project status reports under Admin/Project Reporting
- Schedule Change Requests – n/a, there were no schedule changes
- Final Project Deliverables
- Production Readiness Review

Resource Management
- Project Plan

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- Governance Document
- Staffing Requests – see the project requests here

Change Management

- Communication Strategy
- Internal and External Communication Plans – see the communications strategy and Communications Audit
- Stakeholder Analysis – see the Stakeholders tab here
- Impact Assessment – n/a
- Transition Strategy – n/a
- Training Strategy – n/a
- Training Material – this amterial was retained in the KMS repository

Technical Solution and Implementation

- Requirements Document - HTA and Bill 25
- Requirements Traceability Matrix – n/a
- Functional Specification– see the System Use Cases under Technial/Use Cases
- Solutions Architecture Document – n/a
- Test Plans
- Test Cases
- Test Results
- Implementation Plan
- Back out Plan – this was documented in the Remedy CR

Customer Satisfaction and User Satisfaction

- Independent Customer Feedback – n/a
- Independent User Feedback – n/a

Project Lessons Learned

- Final Lessons Learned Document

13 Authorization

BTO Authorization

Name:	Louis Kolly	Signature:	*Approved via SharePoint Workflow*
Role:	Manager, EPMO	Date:	
Name:	Dave Ruffeski	Signature:	*Approved via SharePoint Workflow*
Role:	Manager, Business Services	Date:	
Name:	Gary Dessler	Signature:	*Approved via SharePoint Workflow*
Role:	Corporate System Architect	Date:	
Name:	Dave Paradis	Signature:	*Approved via SharePoint Workflow*
Role:	Director, Project Delivery	Date:	

Executive Authorization

Name:	Ginette Johnston	Signature:	*Approved via SharePoint Workflow*
Role:	Director, BTO	Date:	
Name:	John Remillard	Signature:	*Approved via SharePoint Workflow*
Role:	Corporate Business Architect	Date:	

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**Manitoba
Public Insurance**

Project Closeout Report

Bill 30 – Vehicle for Hire
2731

This report has been prepared as advice, opinions, proposals, recommendations, analyses or policy options developed by or for the public body or a minister, as per Section 23(1) of the Freedom of Information and Protection of Privacy Act.

Project Manager: Marc Baldwin

Version: 1.0

Date: November 9, 2018

Revision History

Date	Document Version	Description of changes	Author
Nov. 9, 2018	1.0	Initial draft	Marc Baldwin

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1 Purpose

The Project Closeout Report evaluates how well the project performed against the original plan. The purpose of this document is to document project history and provide links to specific documentation required at project closeout should an audit be performed.

The audience for the Project Closeout Report includes:

- The BTO Management Team
- Potential Auditors (both internal and external)

2 Project Description

This project supported Bill 30, The Local Vehicles for Hire Act, passed by the Government of Manitoba in the fall of 2017 and proclaimed on March 1, 2018. The bill repealed the *Taxicab Act* and disbanded the Taxicab Board.   Municipalities are now responsible for creating bylaws to regulate the Vehicle for Hire (VFH) industry. The City of Winnipeg passed its VFH by-law on December 13, 2017.

The project introduced technology, process, communication, and knowledge management changes to support the policy directives below:

- All taxi, limo, handicab, and livery service to be grouped under a new Vehicle for Hire (VFH) insurance pool
- Development of four new VFH insurance use groups based on declared vehicle use, with a choice of up to four available time bands indicating the time and day a vehicle is authorized to operate as a VFH
- Expiry of and elimination of current Taxi/Livery X1 to X4 registration classes and the transition of current X-registered vehicles to all-purpose based classes and policies
- The elimination of the requirement for a driver to hold a class 4 licence to operate a vehicle for hire
- The elimination of X-plates
- The introduction of flat rates for time bands from Pricing, Forecasting, and Investments, requiring ex-parte approval by the Public Utilities Board
- All individual VFH policy holders, including individual taxicab owner operators, to be eligible for DSR discounting

To support an aggressive timeline set out by the legislation and civic by-law, the project delivered the full deployment in a sequence of functional upgrades. The project team delivered solution elements to issue new insurance policies on March 1, 2018. Subsequent deployments delivered secondary solution components, such as the full integration with CARS, DLS, and other third party systems. There is a final deployment pending the execution of the data sharing agreement between the City of Winnipeg and

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MPI. As it was not signed at the completion of project activities, its delivery will be transitioned to operations.

3 Scope of Work:

The project developed technology and information tools to support the following specific scope items for the March 1, 2018 release:

- 16 New insurance uses
  - AOL Ref data, AOL logic updates, and IWS client changes
- Changes to key IWS policy documentation and output
  - Vehicle Insurance certificate updates
  - Policy Application Form, including new declarations
- Ability to handle DSR discounts
- CARS and claims testing, possibly minimal coding, to ensure the new insurance uses flow properly across internal systems
- Current taxi/livery registration and insurance use transition strategy
- Agent commission schedule changes, regulatory amendments to issue the new insurance uses
- Broker, internal staff, and public communication to describe the changes
- Internet and intranet policy and procedure updates

Additional releases later in 2018 support the remainder of the solution.

- Data Sharing
  - VFH Partner – Driver and Vehicle Information Sharing
  - CoW – Taxicab Vehicle Change Report
  - Polk/Experian Vehicle Extract
  - Other existing Data Extracts

- Claims Updates
  - VFH Contact Centre Claims Process
  - VFH Adjuster Claims Process
  - VFH Trip History Request
  - Taxicab Automated Notification Form
  - Misc CARS change

- Output
  - Annual Assessment Notices
  - Claims Experience Letters

- Process Updates
  - Driver's Licensing – Paper Stock

   o   Taxi/Livery Inventory

A detailed list of Project Deliverables can be found by selecting the following link:

4   Out of Scope:

These items, considered during the inception phase, were not in the scope of the release.

- Support in AOL for Dual Use of Common Carrier Local and Vehicle for Hire policies
- New VFH Rates
- Public Utilities Board 2018 VFH rebating functionality in the forthcoming PUB award

4.1   Outstanding Defects

There were no outstanding defects stemming from the completion of this project

Work ticket	Work Ticket Name	Date	Severity	Assigned To
N/A				

4.2   Outstanding Issues

The following two integration tickets were defined, developed, and tested, but not delivered to production with the release as the City of Winnipeg had not yet signed the agreement with MPI to share vehicle and driver data. Once the agreement is executd, production support can deliver the functionality into production.

Ticket	Issue Details	Actions	Assigned To
ESS25763	VFH Day 2 Release Strategy, CCB Direction Request - VFH Day 2: City of Winnipeg Data Share	Deliver to production once MPI-CoW agreement is executed.	I/C Team
ESS25764	VFH Day 2 Release Strategy, CCB Direction Request - VFH Day 2: TNC Partner Data Share	Deliver to production once MPI-CoW agreement is executed.	I/C Team

5   Planned vs. Delivered Milestones

Milestone	Group Responsible	Planned Milestone Date	Actual Date
Project Charter Approved	BTO Management	December 8, 2017	November 3, 2017
Detailed Release 1 Business Requirements Drafted	Project team	December 4	December 1
Detailed Release 1 Business Requirements Approved	Corporate Business Architect	December 22	December 15
Release 1 System Use Cases Approved	Corporate Business Architect	December 22	December 22
Release 1 development start	Project team	December 11	December 11
KMS Needs Assessment	Knowledge Management Services	January 12, 2018	January 12, 2018
Release 1 development end	Project team	January 12	January 12
New VFH Insurance Uses approved by PUB	Public Utilities Board	January 15	January 15
Release 1 system integration testing end	Project team	January 19	January 19
Release 1 user acceptance testing start	Quality, Control, and Metrics	January 22	January 29
KMS Plan	Knowledge Management Services	January 26	January. 26
Release 1 user acceptance end	Quality, Control, and Metrics	February 23	March 18
Complete training and communications delivery	Change Services	February 27	February 27
Scope Delivery 1	Project team	February 25	February 25
MPICA regulatory updates	Registrar	March 1	March 1
Business Context/ High Level Requirements Document Complete	Project Team	April 27	April 27
System Use Cases Complete	Project Team	May 11	May 18
Build Start	Project Team	May 14	May 14
Depot Build Finish	Project Team	June 22	June 29
Integration UPSP Testing	Project Team	June 25	July 3

Milestone	Group Responsible	Planned Milestone Date	Actual Date
Integration City of Winnipeg Testing	City of Winnipeg	June 25	August 30
Integration Release	Project Team	July 13	TBD
System Integration Testing Start	Project Team	June 25	July 3
System Integration Finish	Project Team	July 13	July 13
User Acceptance Testing Start	QCM	July 16	July 23
User Acceptance Testing Finish	QCM	August 10	August 10
Depot Implementation	Project Team	August 19	August 26
Warranty Complete	Project Team	September 7	September 7

6   Project Financials

The following is a summary of the financial history of the project.

Fiscal Year	2017-2018
Statement of Work/Insertion of Work	1
Corporate Intake Request #	n/a
Project Code(s)	2731
Project Code(s) Closed (Y/N)	Y
If no, please provide explanation	
Original Approved Budget	$600,000

Change Requests

CR_____	$

Decision Requests

DR_____001	$0.00

Current Budget	$600,000
Life to Date Actuals	$604,494.93
Variance to Budget	$4,494.93

6.1   Schedule and Budget Report

The following highlights variances between estimated and actual effort (hours) and budget (dollars) required for each stream within the project.

Budget by Project Streams	Estimated (Hours)	Actual (Hours)	Variance %
Business Analysis	2,269	1,341.25	59%
Development	3,192	2,849.25	89%
System Analysis	1,870	1,035.25	55%
Architecture	298	223.5	75%
UAT Leads	720	856	119%
UAT Team	2,200	3898.5	177%
Communication	260	0	n/a
Change Management	390	263.75	68%
Knowledge Management	600	778.25	130%
Project Management	570	598.25	105%
Batch Running	260	115.5	44%
Test Coordination	360	304.25	85%
Database Administration	254	114.5	45%
Data Architecture	172	114.5	67%
Total	13,415	12,492.75	93%

7   Resource Management Summary

Question	Response
A Staffing Plan was documented and defined the roles and responsibilities of staff on the project?	Yes
How many resource requests submitted during the project?	100
Were the resource requests filled satisfactorily and within a timely manner? If no, please identify or explain laps in resource fulfillment.	Yes
Were the resources provided the correct resources based on the requests submitted? If no, please identify or explain.	Yes

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Question	Response
Overall, please provide a summary for the project resourcing as it relates to the success for the project delivery.	Resourcing was successful, the team worked well.

8   Lessons Learned Recommendations and Assignments

This section is intended to help apply the lessons learned by incorporating them into processes. Provide a summary of lessons learned gathered from the project. Identify key suggestions and recommendations which may assist future project from experiencing similar problems.

Action Item #	Action Item	Responsibility	Due Date	Status
1	**Broker D/L IWS Password** We've had a standing request to not use the following characters in the download password because of possible confusion: • O (oh) • 0 (zero) • I (eye) • 1 (one) Some brokers get these characters confused due to the fonts their workstations use and it sometimes results in calls coming into the IT Support desk on release day. The passwords used to be set by someone in ESS but after they had some people move on to other positions, we don't know who to pass this request on to.	Project Team	Next project	Open
2	**Impacted Application Sheet** Add impacted application/table impacts spreadsheet as a standing agenda item to project status meetings so that the DA is collecting all impacts from the dev team and the PM can communicate to impacted app owners.	Project Team	Next project	Open

Action Item #	Action Item	Responsibility	Due Date	Status

9   Appendix A –PIR Recommendation Checklist

This following chart contains a sample checklist of recommended items that will help to improve the probability of success for any project and provide a solid foundation to assist the project manager in preparing for a PIR. **Below are only examples of questions for some of the evaluation areas.**

Questions:
Business Case & Vision Planning
Do you have a Business Case that includes the following information? **Yes**
Description of why the proposed system is an appropriate investment
An overall Timeline with Milestones
Definition of Primary goals of the system
An estimated budget
Do you have a Vision Document that describes how the project supports the mission of MPI? **No**
Risks & Risk Mitigation
Do you have a Risk Management Plan? **Yes**
Do you have a mechanism for documenting risks as they occur? **Yes**
Cost
Do you have a written budget plan that includes the following elements? **Yes**
Clearly stated baseline cost goals
Assignment of budget responsibilities
Have you defined a method to record expenditures? **Yes**
Do you have a cost revision documentation and a change approval process? **Yes**
Schedule
Do you have an original project schedule that includes the following elements? **Yes**
Specific milestones
Clearly defined durations for each implementation phase
Development tasks clearly assigned to specific phases of the effort
Mechanism for identifying assigned / responsible personnel
Do you have a change tracking mechanism? **Yes**
Customer & User Satisfaction
Are the customers and users of the specific system clearly defined? **Yes**
Are clear goals defined for each kind of customer or user? **Yes**

Questions:	Page
Project Lessons Learned	
Is there a mechanism to collect lessons learned that includes the following elements: **Yes**	
Accessibility by all project personnel	
Standardized submission format	
Ability to submit throughout all phases of the project	

10 Appendix B –Documents Required to Support PIR(s)

Below is a list of typical project documentation that can be used to support PIRs. Any other relevant documents that are available should be provided to the evaluation team for inclusion into the PIR.

Business Case and Vision Planning
- Business Case – n/a see DR001
- Project Charter
- Project Plan - Initial Release Plan, Second Release Plan
- Business Architecture Document – n/a see DR001

Scope Management
- Requirements Document
  - Day 1 BCD
  - Day 1 Rules
  - Day 2 BCD
  - Day 2 Rules
- Requirements Traceability Matrix – in ALM
- Functional Specification – See the project sharepoint under: Technical -> Use Cases
- Assumption Documents
- Change Requests – n/a
- Decision Requests - DR001

Risks and Risk Mitigation
- Risk Assessment – see the Project Risk Log here for these items
- Risk Summary
- Risk Log
- Status Reports

Project Communication
- Project Plan - Initial Release Plan, Second Release Plan
- Meeting Minutes – See the project sharepoint under: Admin -> Meeting Minutes
- Status Reports - – See the project sharepoint under: Admin -> Project Reporting/Presentations and the status reports on the PPM
- Project Presentations See the project sharepoint under: Admin -> Project Reporting/Presentations

Cost Management
- Original Budget – See the Project Charter
- Final Budget – Final Forecast
- Invoices – n/a
- Cost Change Requests – n/a

Schedule Management
- Original Project Schedule- here
- Final Project Schedule - here
- Milestone Reports – see Schedule
- Schedule Change Requests – n/a

- Final Project Deliverables – Deliverable Log
- Production Readiness Review – here and here

Resource Management

- Project Plan - Initial Release Plan, Second Release Plan
- Governance Document – n/a
- Staffing Requests - here

Change Management

- Communication Strategy - here
- Internal and External Communication Plans - here
- Stakeholder Analysis - Initial Release Plan, Second Release Plan
- Impact Assessment – n/a
- Transition Strategy – n/a
- Training Strategy – n/a
- Training Material - See the project sharepoint under: Training Material

Technical Solution and Implementation

- Requirements Document
  - Day 1 BCD
  - Day 1 Rules
  - Day 2 BCD
  - Day 2 Rules
- Requirements Traceability Matrix – in ALM
- Functional Specification – See the project sharepoint under: Technical -> Use Cases
  - Solutions Architecture Document - here
  - Test Plans – here and here
  - Test Cases – in ALM
  - Test Results – IN alm
  - Implementation Plan –
    - February 25
    - August 26
  - Back out Plan – see release CRs

Customer Satisfaction and User Satisfaction

- Independent Customer Feedback – n/a
- Independent User Feedback – n/a

Project Lessons Learned

- Final Lessons Learned Document – here and this document

11 Authorization

Approval of the Project Closeout Report indicates an understanding and formal agreement the project for which this Closeout Report has been prepared for has completed all required tasks and is ready to be closed.

BTO Authorization

Name:	Robin Hildawa	**Signature:**	*See SharePoint Workflow*
Role:	EPMO Officer, EPMO	**Date:**	
Name:		**Signature:**	*See SharePoint Workflow*
Role:	Manager, Business Services	**Date:**	
Name:	Gary Dessler	**Signature:**	*See SharePoint Workflow*
Role:	Corporate System Architect	**Date:**	
Name:	Dave Paradis	**Signature:**	*See SharePoint Workflow*
Role:	Director, Project Delivery	**Date:**	

Senior Management Authorization

Name:	Ken Harkness	**Signature:**	*See SharePoint Workflow*
Role:	Director, BTO	**Date:**	
Name:	John Remillard	**Signature:**	*See SharePoint Workflow*
Role:	Corporate Business Architect	**Date:**	

September 5, 2019
August 21, 2019

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MPI Exhibit #19
2020 GRA Information Requests - Round 1
PUB (MPI) 1-85(b) Appendix 1 - Redacted

**Manitoba
Public Insurance**

Project Closeout Report

Windows Server Vitality ▓▓▓▓▓▓ 2786
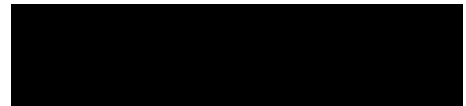
This report has been prepared as advice, opinions, proposals, recommendations, analyses or policy options developed by or for the public body or a minister, as per Section 23(1) of the Freedom of Information and Protection of Privacy Act.

Project Manager: Joey Bruneau

Version: 1.0

Date: May 29, 2019

September 5, 2019
August 21, 2019

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MPI Exhibit #19
2020 GRA Information Requests - Round 1
PUB (MPI) 1-85(b) Appendix 1 - Redacted

Template Version History

Version	Date	Author	Comments
1.0	Oct 2018	Stephen Bryden	Added template version history section & added OBC to the approvers section.

Revision History

Date	Document Version	Description of changes	Author
May 29, 2019	1.0	Initial draft	Joey Bruneau

Table of Contents

1 Purpose

The Project Closeout Report is the Project Manager's report evaluating how well the project performed against the original project plan. The purpose of this document is to define and provide links and attached documentation required at project closeout should an audit be performed.

The audience for the Project Closeout Report includes:
- The Project Manager
- The BTO Management Team
- Potential Auditors (both internal and external)

Information within the closeout report will be leveraged for post project audits, and therefore must be included within this document as attachments, embedded documents, or links to the location of the source documents.

2 Project Description

Windows ▮▮▮ Vitality Readiness
- Create a plan to execute Vitality on all identified Windows ▮▮▮ servers. This may include the identification of required business cases for the 2019 fiscal year
- Identify and perform upgrades on low effort, low risk servers or when required for upgrading SQL Server or when synergies exist with SQL Server upgrades

SQL ▮▮▮ Vitality Upgrade
▮▮ Upgrade all SQL ▮▮ instances to a supported SQL version ▮▮▮▮▮▮▮▮

2.1 Planned Scope of Work

The following identifies the products and services originally agreed to as deliverables for the project and which were approved through the original Project Plan.

Major Deliverable	Link to Support Document
Business Objects (includes Broker Scorecard & InfoBurst) – application and SQL server upgrade	███████████
Genesys PureConnect (Customer Interaction Center (ININ)) – application and SQL server upgrade	███████████
PowerDesigner – SQL server upgrade	███████████
SnoPass Community Portal – SQL server upgrade	n/a
Internal Audit Tools (Auto Audit) – SQL server upgrade	n/a

Major Deliverable	Link to Support Document
SharePoint – SQL server upgrade	███████████████████
VIS-Check – SQL server upgrade	███████████████████
Winter Tire Program – SQL server upgrade	███████████████████
Windows ████ analysis document	███████████████████

A detailed list of Project Deliverables can be found by selecting the following link:
██

2.2   *Scope of Work Delivered/Excluded*

The following identifies the work products and services that were ultimately delivered or items that were originally in scope but were excluded through Change Requests (CRs) or Decision Requests (DRs).

Major Deliverable	Link to Support Document
Business Objects (includes Broker Scorecard & InfoBurst) – application and SQL server upgrade	███████████████████
Genesys PureConnect (Customer Interaction Center (ININ)) – SQL server upgrade only	CR-003-WSV
PowerDesigner – application (added) & SQL server upgrade	DR-003-WSV
SnoPass Community Portal – decommission	CR-004-WSV, DR-005-WSV
Internal Audit Tools (Auto Audit) – decommission	DR-001-WSV
SharePoint – SQL server upgrade	███████████████████
VIS-Check – SQL server upgrade	███████████████████
Winter Tire Program – SQL server upgrade	███████████████████

Major Deliverable	Link to Support Document
SnoPass SFTP – added to scope	CR-004-WSV, DR-005-WSV
ALM Upgrade – de-scoped	DR-002-WSV
Windows ▮ analysis document	▮

2.3   Outstanding Defects

The following outstanding defects or items have been accepted as work which will be corrected through Production Support.

Work ticket	Work Ticket Name	Date	Severity	Assigned To
n/a	n/a	n/a	n/a	n/a

2.4   Outstanding Issues

The following outstanding issues have been identified. To ensure clear understanding, information pertaining to the resolution, status, who is assigned the issue, or next steps should be included.

Issue	Issue Details	Actions	Assigned To
n/a	n/a	n/a	n/a

3   Planned vs. Delivered Milestones

Major Milestone	Schedule Baseline	Actual Date	Comments (Include CR#s)
Project completion	Feb. 28, 2019	March 29, 2019	CR-005-WSV
Project completion	March 29, 2019	April 30, 2019	CR-006-WSV

4   Project Financials

The following is a summary of the financial history of the project.

Fiscal Year	2018/2019
Statement of Work/Insertion of Work	n/a

Corporate Intake Request #	
Project Code(s)	2786
Project Code(s) Closed (Y/N)	Y
If no, please provide explanation	
Original Approved Budget	$165,000

Change Requests

CR-001-WSV – Forecast Increase	$389,991
CR-002-WSV – Licensing Service	$(13,466)
CR-003-WSV – Genesys OS Upgrades	$(8,000)
CR-004-WSV – SnoPass SFTP	$12,000
CR-005-WSV – SharePoint Extension	$14,000
CR-006-WSV – SharePoint Extension 2	$14,000
	$408,525

Decision Requests

DR-001-WSV – Internal Audit Server	$ n/a
DR-002-WSV – ALM Upgrade	$ n/a
DR-003-WSV – PowerDesigner Upgrade	$ n/a
DR-004-WSV – Domain Controllers	$ n/a
DR-005-WSV – SnoPass Migration	$ n/a
DR-006-WSV – SharePoint Extension	$ n/a
DR-007-WSV – SharePoint Extension #2	$ n/a

Executive Direction/Budget Audit Documentation

Exec #1 (insert link to document)	$ n/a
Current Budget	$408,525
Life to Date Actuals	$350,526

Variance to Current Budget	$(57,999)
Variance to Original Budget	$185,526

4.1 Schedule and Budget Report

See Project Financials - 2018 and Project Financials – 2019 workbooks.

5 Resource Management Summary

Question	Response
A Staffing Plan was documented and defined the roles and responsibilities of staff on the project?	n/a
How many resource requests submitted during the project?	28
Were the resource requests filled satisfactorily and within a timely manner? If no, please identify or explain laps in resource fulfillment.	Yes
Were the resources provided the correct resources based on the requests submitted? If no, please identify or explain.	Yes
Overall, please provide a summary for the project resourcing as it relates to the success for the project delivery.	The appropriate SMEs were assigned to the project.

6   Lessons Learned Recommendations and Assignments

This section is intended to help apply the lessons learned by incorporating them into process(s). Provide a summary of lessons learned gathered from the project. Identify key suggestions and recommendations which may assist future project from experiencing similar problems.

See Lessons Learned workbook for details on each lesson.

Finding	Impact
Power Designer - Portal app not working - installed viewer	Communication and timelines - installed the web application on servers and communicated to stakeholders to use it and then had to remove and deploy the viewer.
PowerDesigner - Licensing cost savings	Get more users for the same price all licensing in one pool and a lot less work to install and maintain
PowerDesigner (SySam) - Licensing server incompatibility with new version of PowerDesigner	Needed to be CR'd to change scope and timing
Business Objects - Resources not familiar with working with IBM and the time needed to work through CR's and processes	Schedule timelines; delays in completing deliverables
Change Management process not fully understood	Implementation delays of changes; CRs requiring to be expedited
SRF process has no formal approval on both IBM and MPI sides	Delays in completing server builds due to IBM SMEs not reviewing the specs prior to work beginning
Database team was very good	no impact with any database requirements
Business Objects - Alternative implementation plans could have been investigated	Potentially could have reduced the time to implement
Winter Tire Program - On implementation day the IBM resource assigned did not have access to the servers. Also, an MPI resource assumed the implementation would be completed early and had other commitments requiring them to leave early	Implementation was at risk of not completing within the outage window

SnoPass - Review of solution was beneficial as an alternative was determined to be more cost effective while satisfying the business requirements	Reduced operation costs and effort during implementation
SharePoint - Lead times for planning application Disaster Recovery testing insufficient due to availability of UAT environments	Delays to disaster recovery testing and project timelines
There is no formal review and approval of firewall changes prior to implementation	Potential issues with firewall changes when implementing
The creation of workstreams in the schedule and management of team meetings by workstream provided time efficiencies	efficient meetings and use of team members time

7   Appendix A –PIR Recommendation Checklist

This following chart contains a sample checklist of recommended items that will help to improve the probability of success for any project and provide a solid foundation to assist the project manager in preparing for a PIR. **Below are only examples of questions for some of the evaluation areas.**

Questions:
Business Case & Vision Planning
Do you have a Business Case that includes the following information?
Description of why the proposed system is an appropriate investment
An overall Timeline with Milestones
Definition of Primary goals of the system
An estimated budget
Do you have a Vision Document that describes how the project supports the mission of MPI?
Risks & Risk Mitigation
Do you have a Risk Management Plan?
Do you have a mechanism for documenting risks as they occur?
Cost
Do you have a written budget plan that includes the following elements?
Clearly stated baseline cost goals
Assignment of budget responsibilities
Have you defined a method to record expenditures?
Do you have a cost revision documentation and a change approval process?
Schedule
Do you have an original project schedule that includes the following elements?
Specific milestones
Clearly defined durations for each implementation phase
Development tasks clearly assigned to specific phases of the effort

Questions:
Mechanism for identifying assigned / responsible personnel
Do you have a change tracking mechanism?
Customer & User Satisfaction
Are the customers and users of the specific system clearly defined?
Are clear goals defined for each kind of customer or user?
Project Lessons Learned
Is there a mechanism to collect lessons learned that includes the following elements:
Accessibility by all project personnel
Standardized submission format
Ability to submit throughout all phases of the project

8   Appendix B –Documents Required to Support PIR(s)

Below is a list of typical project documentation that can be used to support PIRs. Any other relevant documents that are available should be provided to the evaluation team for inclusion into the PIR.

Business Case and Vision Planning
- Business Case
- Project Charter
- Project Plan
- Business Architecture Document

Scope Management
- Requirements Document
- Requirements Traceability Matrix
- Functional Specification
- Assumption Documents
- Change Requests
- Decision Requests

Risks and Risk Mitigation
- Risk Assessment
- Risk Summary
- Risk Log
- Status Reports

Project Communication
- Project Plan
- Meeting Minutes
- Status Reports
- Project Presentations

Cost Management
- Original Budget
- Final Budget
- Invoices
- Cost Change Requests

Schedule Management
- Original Project Schedule
- Final Project Schedule
- Milestone Reports
- Schedule Change Requests
- Final Project Deliverables
- Production Readiness Review

Resource Management
- Project Plan
- Governance Document
- Staffing Requests

Change Management
- Communication Strategy
- Internal and External Communication Plans
- Stakeholder Analysis
- Impact Assessment
- Transition Strategy
- Training Strategy
- Training Material

Technical Solution and Implementation
- Requirements Document
- Requirements Traceability Matrix
- Functional Specification
- Solutions Architecture Document
- Test Plans
- Test Cases
- Test Results
- Implementation Plan
- Back out Plan

Customer Satisfaction and User Satisfaction
- Independent Customer Feedback
- Independent User Feedback

Project Lessons Learned
- Final Lessons Learned Document

9 AUTHORIZATION

Approval of the Project Closeout Report indicates an understanding and formal agreement the project for which this Closeout Report has been prepared for has completed all required tasks and is ready to be closed.

Name:	Lawrence Lazarko	**Signature:**	*See SharePoint Workflow*
Role:	Director, I.T. & Operational Business Champion (OBC)	**Date:**	
Name:	John Remillard	**Signature:**	*See SharePoint Workflow*
Role:	Corporate Business Architect	**Date:**	
Name:	Bruce Kisell	**Signature:**	*See SharePoint Workflow*
Role:	Director, Project Delivery	**Date:**	
Name:	Ken Harkness	**Signature:**	*See SharePoint Workflow*
Role:	Director, BTO	**Date:**	