David Ash – Chip Schutte – Michael Hobert - Sharon Keeler – Chuck Bishop

AGENDA
Joint Administrative Services Board
Monday July 28, 2014 1:00 p.m.
Joint Government Center

1. **Call to Order.**

2. **Approval of Minutes. (May 27 Minutes Attached).**

3. **ERP Implementation Update.** The kickoff meeting was held, general information on the project was gathered for development of the "project plan" and "implementation plan". Components of these plans are "the communications plan" and the "risk management plan". This full day meeting was followed by another meeting the next day from 8:30 to 2:30 to review the Scope of Work and Contract. This was tedious, but did raise a number of ambiguities and missing pieces which Tyler is investigating. 7/29 and 7/30 are full day meetings to restructure the Chart of Accounts. The SharePoint software (similar to Wrike) is being set up. Board members will have access to track the project. Sampling of issues:

   a. Distributed versus central input of AP.
   b. Minimum time unit.
   c. Substitute Caller.
   d. Electronic timesheets.
   e. Purchasing cards
   f. Monthly employee reimbursements.
   g. Force policy change timeline to ERP implementation timeline.
   h. What version are we getting: need Silverlight, Java, Internet Explorer?
   i. ESRI upgrade.
   j. Additional cashiering sites.
   k. Bank of Clarke service levels.

4. **Garnishment Fee.** We have approximately a dozen garnishments on each payroll. These are a combination of court orders, tax liens, and child support payments. There is substantial turnover each month in the list of garnishees, and approximately fours hours per month is spent setting up the garnishments, calculating the deductions, and processing the checks and associated paperwork. This costs approximately $150 per month and is especially troublesome for the arrears payrolls processed in June to cover 10 month employees for the summer months. Employers are permitted to assess fees to recover the cost of garnishments as follows:

   a. Garnishment summons: $10 per summons.
   b. Tax lien: $20 per lien.
   c. Child support: $5 per pay period.

The revenue collection would vary over the course of the year, but it does not appear that it will exceed the cost of providing the service. See attached statute citations.

5. **Pay and Classification Update.** JAS positions were considered in the Evergreen Study conducted by the Clarke County Public Schools. However, before presentation to the School Board on June 6 the positions were withdrawn because comparable position classifications from other communities could not be found. Meanwhile, the School Board has postponed action on the Evergreen Study recommendations that were received. Evergreen remains willing to proceed with a determination of JAS position salaries using a different methodology. Position descriptions will be reviewed and approved, and direction will be given to them to proceed.

6. **Set Next Meeting.**

Joint Administrative Services Board

May 27, 2014 Special Meeting 1:00 pm

At a regular meeting of the Joint Administrative Services Board held on Tuesday, May 27, 2014 at 1:00 pm in the Clarke County Administration Office meeting room, Berryville Clarke County Government Center, 101 Chalmers Court, 2nd Floor, Berryville, Virginia.

Members Present

David Ash; J. Michael Hobert; Sharon Keeler; Michael Murphy; Chip Schutte

Members Absent

None

Staff Present

Tom Judge; Gordon Russell; Lora Walburn

Others Present

None

1. Call To Order - Determination of Quorum

At 1:00 pm, Michael Hobert called the meeting to order.

Tom Judge requested the addition of Commonwealth Budget Status Discussion.

By consensus, the Board adopted the agenda as modified.

2. Approval of Minutes

Chip Schutte, seconded by Sharon Keeler, moved to approve the May 7, 2014 minutes as presented. The motion carried by the following vote:

David Ash	-	Aye
J. Michael Hobert	-	Aye
Sharon Keeler	-	Aye
Michael Murphy	-	Abstain

Charles "Chip" Schutte	-	Aye

3. Closed Session

Chip Schutte, seconded by Mike Murphy, moved to convene into Closed Session: "Be it resolved that the Joint Administrative Services Board go into Closed Session pursuant to Code of Virginia Section 2.2-3711(A)(30) for the purpose of discussing Contract Negotiation Strategy. The motion carried as follows:

David Ash	-	Aye
J. Michael Hobert	-	Aye
Sharon Keeler	-	Aye
Michael Murphy	-	Aye
Charles "Chip" Schutte	-	Aye

The members of the Joint Administrative Services Board being assembled within the designated meeting place, with open doors and in the presence of members of the public and/or the media desiring to attend, **Chip Schutte, seconded by Mike Murphy, moved to reconvene in open session. The motion carried as follows:**

David Ash	-	Aye
J. Michael Hobert	-	Aye
Sharon Keeler	-	Aye
Michael Murphy	-	Aye
Charles "Chip" Schutte	-	Aye

Subsequent to reconvening in open session, Chairman Hobert called for Certification.

CERTIFICATION OF CLOSED SESSION

WHEREAS, the Joint Administrative Services Board of the County of Clarke, Virginia, has convened a closed meeting on the date pursuant to an affirmative recorded vote and in accordance with the provisions of the Virginia Freedom of Information Act; and

WHEREAS, Section 2.2-3700 of the Code of Virginia requires a certification by the Joint Administrative Services Board of the County of Clarke, Virginia that such closed meeting was conducted in conformity with Virginia law.

NOW, THEREFORE BE IT RESOLVED, that the Joint Administrative Services Board of the County of Clarke, Virginia, hereby certifies that, to the best of each members knowledge, (i) only public business matters lawfully exempted from open meeting requirements by Virginia law were discussed in the closed meeting to which the certification resolution applies, and (ii) only such public business matters as were identified in the motion convening the closed meeting were heard, discussed or considered by the Joint Administrative Services Board of the County of Clarke, Virginia.

The motion was approved by the following roll-call vote:

David Ash	-	Aye
J. Michael Hobert	-	Aye
Sharon Keeler	-	Aye
Michael Murphy	-	Aye
Charles "Chip" Schutte	-	Aye

Following Closed Session, **Chip Schutte, seconded by David Ash, moved to approve the contract as revised and present it to the Clarke County Board of Supervisors. The motion carried as follows:**

David Ash	-	Aye
J. Michael Hobert	-	Aye
Sharon Keeler	-	Aye
Michael Murphy	-	Aye
Charles "Chip" Schutte	-	Aye

Mike Murphy will present the contract for informational purposes to the School Board at its May 28 meeting.

Tom Judge will notify Constitutional Officers and other affected entities.

Status of Commonwealth Budget

Highlights of Board discussion include:

- The Commonwealth has not adopted a budget.
- The recently identified $300 million revenue shortfall requires adjustment to the budget previously reviewed by the General Assembly.
- Commonwealth revenues used in the County's budget are based the Commonwealth projections.
- Without an appropriation, it is unlawful to distribute funds.
- VACo is working on addressing alternatives, issues and best practices.

Action Items:

- By consensus, the Board agreed to plan for worst case.
- Board of Supervisors and Schools Finance Committees need to talk about individual efforts and coordinate statements with vendors and employees.

- Staff to compose a statement for distribution to all General Government and School employees advising of potential salary disruption should the Commonwealth fail to adopt a budget by July 1.
- Staff to draft a notice to vendors that orders may be cancelled.
- Mike Murphy will forward VSBA communication received today.
- General Government and Schools should consider freezing new hires and capital expenditures.
- The Board of Supervisors and the School Board must work very closely in planning and communicating. Toward this goal, the Boards may wish to consider a joint discussion.

4. Set Next Meeting

Tom Judge advised that the next regularly scheduled meeting of the Board set for Monday, June 23, 2014 at 1:00 pm in Meeting Room AB at the Berryville Clarke County Government Center may not be necessary.

6. Adjournment

At 2:05 pm, Chairman Hobert adjourned the meeting.

Minutes Recorded and Transcribed by: Lora B. Walburn

Fee for Garnishments, Support Orders and Tax Lien Deductions

Background

The Code of Virginia provides for the assessment of fees to be paid by both full time and part-time employees for the costs of collection of garnishments, tax liens and child support orders. Executive Branch agencies must collect these fees as follows:

Code of Virginia	Collection Fee	Frequency
§ 8.01-512.2	Garnishment $10.00	once per summons
§ 63.1-256	Child Support $ 5.00	per remittance/per order
§ 58.1-1804	Tax Lien $20.00	once per tax lien

Guidelines

Fees are imposed on the employee's disposable income (gross wages less deductions required by law) after the court-ordered deduction but before any voluntary deductions (i.e., health care or flexible spending accounts). Note: The combined child support amount and fee may not exceed the maximum limit applied to disposable earnings as established by Code of Virginia (§ 34-29) and the Federal Consumer Credit Protection Act (CCPA) (15 U.S.C. 1673(b)). If the employee's disposable income is not sufficient to deduct the fee during the pay period the court order is initiated, then:

support order fees are waived,
fees for garnishments and tax liens must be collected when funds become available.

Multiple Orders

In the event you have a child support order in combination with a garnishment or tax lien you may do a tax and deduction override to add the appropriate fee to the regularly collected support order fee.

Court Orders Served But Not Processed

If an agency is served with a court ordered withholding for a garnishment or tax lien which is subsequently resolved prior to payroll processing, the agency is still obligated to assess the garnishment fee.

Out-of-State Support Orders

Out-of-state support orders with an administrative (garnishment) fee different from Virginia **do not override** the required assessment.

Fee Exemptions

Fees should not be collected on the following court ordered withholdings; bankruptcy, IRS federal tax levies, local and county tax liens.

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Implementation Management Plan

2014

Table of Contents

List of Appendices

Introduction

The purpose of this document is to provide tools and useful information that will help contribute to the success of your project. It covers various areas of planning used throughout the implementation and will be used along with the project plan to manage the project. We will request sign-off on the initial delivery of the plans included in this document once they are completed. The document will then be updated throughout the life of the implementation as seen fit by the Clarke County, VA and Tyler PM.

Document Change Control Information

Change Control Number	Change Date	Description

Scope Agreement

Product & Services Scope

Listed below are the contracted products and services included in the implementation. Services are billed per the contract terms.

Software and Associated Implementation Days

SaaS				One Time Fees		
Description	# Years	Annual Fee	Annual Fee Net	Impl. Days	Impl. Cost	Data Conversion
Financial:						
Accounting/GL/BG/AP	5	$7,866.00	$7,866.00	26 @ $1,175.00	$30,550.00	$8,200.00
BMI Asset Track Interface	5	$1,505.00	$1,505.00	2 @ $1,175.00	$2,350.00	$0.00
BMI CollectIT Interface	5	$1,505.00	$1,505.00	2 @ $1,175.00	$2,350.00	$0.00
Cash Management	5	$1,881.00	$1,881.00	2 @ $1,175.00	$2,350.00	$0.00
Contract Management	5	$1,231.00	$1,231.00	2 @ $1,175.00	$2,350.00	$0.00
Fixed Assets	5	$3,010.00	$3,010.00	4 @ $1,175.00	$4,700.00	$3,000.00
Inventory	5	$3,010.00	$3,010.00	3 @ $1,175.00	$3,525.00	$2,400.00
Project & Grant Accounting	5	$2,257.00	$2,257.00	2 @ $1,175.00	$2,350.00	$4,000.00
Purchasing	5	$4,891.00	$4,891.00	8 @ $1,175.00	$9,400.00	$1,800.00
Student Activity Accounting	5	$2,736.00	$2,736.00	3 @ $1,175.00	$3,525.00	$0.00

Payroll/HR:

Applicant Tracking	5	$1,881.00	$1,881.00	2 @ $1,175.00	$2,350.00	$0.00
HR Management	5	$5,267.00	$5,267.00	5 @ $1,175.00	$5,875.00	$0.00
Payroll w/ESS	5	$11,012.00	$11,012.00	26 @ $1,175.00	$30,550.00	$18,800.00

SaaS				One Time Fees		
Description	**# Years**	**Annual Fee**	**Annual Fee Net**	**Impl. Days**	**Impl. Cost**	**Data Conversion**
Revenue:						
Accounts Receivable	5	$2,633.00	$2,633.00	4 @ $1,175.00	$4,700.00	$0.00
CAMA Bridge	5	$3,256.00	$3,256.00	1 @ $1,175.00	$1,175.00	$0.00
General Billing	5	$1,129.00	$1,129.00	2 @ $1,175.00	$2,350.00	$6,180.00
Maplink GIS Integration	5	$3,420.00	$3,420.00	1 @ $1,175.00	$1,175.00	$0.00
Permits & Code Enforcement	5	$9,240.00	$9,240.00	15 @ $1,175.00	$17,625.00	$7,000.00
Tax Billing	5	$16,280.00	$16,280.00	23 @ $1,175.00	$27,025.00	$12,000.00
Tyler Cashiering	5	$4,104.00	$4,104.00	3 @ $1,175.00	$3,525.00	$0.00
Utility Billing CIS	5	$4,925.00	$4,925.00	11 @ $1,175.00	$12,925.00	$14,600.00
VA Income Tax	5	$2,052.00	$2,052.00	3 @ $1,175.00	$3,525.00	$0.00

Productivity:						
Citizen Self Service	5	$2,633.00	$2,633.00	1 @ $1,175.00	$1,175.00	$0.00
eProcurement	5	$1,881.00	$1,881.00	0 @ $1,175.00	$0.00	$0.00
Munis Analytics & Reporting (SaaS)	5	$7,000.00	$7,000.00	5 @ $1,175.00	$5,875.00	$0.00
Tyler Content Manager SE	5	$6,156.00	$6,156.00	3 @ $1,175.00	$3,525.00	$0.00
Tyler Forms Processing	5	$5,250.00	$5,250.00	0 @ $1,175.00	$0.00	$0.00
Other:						
Payroll Tax Table Updates	5	$1,000.00	$1,000.00	0 @ $1,175.00	$0.00	$0.00
TOTAL:		**$119,011.00**	**$119,011.00**	**159**	**$186,825.00**	**$77,980.00**

Other Services

Description	Quantity	Unit Price	Unit Discount	Extended Price
AP/PR Check Recon Import	1	$1,000.00	$0.00	$1,000.00
AP Positive Pay Export Format	1	$3,000.00	$0.00	$3,000.00
Estimated Travel Expenses	1	$73,980.00	$0.00	$73,980.00
Munis Admin & Security	2	$1,175.00	$0.00	$2,350.00
Not to Exceed Implementation Days	23	$1,175.00	$0.00	$27,025.00

Other Services

Description	Quantity	Unit Price	Unit Discount	Extended Price
Project Planning Services	1	$4,000.00	$0.00	$4,000.00
PR Positive Pay Export Format	1	$3,000.00	$0.00	$3,000.00
Student Activity AP Check Library - Up to 5 Checks	1	$1,500.00	$0.00	$1,500.00
Tyler Forms Financial Library	1	$1,400.00	$0.00	$1,400.00
Tyler Forms Library - General Billing	1	$1,200.00	$0.00	$1,200.00
Tyler Forms Library - Payroll	2	$1,200.00	$0.00	$2,400.00
Tyler Forms Library - Permits	1	$2,000.00	$0.00	$2,000.00
Tyler Forms Processing Configuration	1	$1,500.00	$0.00	$1,500.00
Tyler Forms Library - State Tax - 8 Forms	1	$5,000.00	$0.00	$5,000.00
Tyler Forms Library - Utility Billing	1	$3,000.00	$0.00	$3,000.00
VPN Device	1	$4,000.00	$0.00	$4,000.00

3rd Party Hardware, Software and Services

Description	Quantity	Unit Price	Unit Discount	Total Price	Unit Maintenance	Unit Maintenance Discount	Total Year One Maintenance
BMI-ASSETRACK-PPC for MUNIS (Incl. Install Fee)	1	$6,490.00	$0.00	$6,490.00	$0.00	$0.00	$0.00
BMI CollectIT Barcode PrinterKit	1	$1,295.00	$0.00	$1,295.00	$0.00	$0.00	$0.00
BMI CollectIT Inventory Bar Code Scanning System	1	$6,490.00	$0.00	$6,490.00	$0.00	$0.00	$0.00
Cash Drawer	1	$230.00	$0.00	$230.00	$0.00	$0.00	$0.00
Hand Held Scanner - Model 1900GSR	1	$385.00	$0.00	$385.00	$0.00	$0.00	$0.00
Hand Held Scanner Stand	1	$25.00	$0.00	$25.00	$0.00	$0.00	$0.00
ID Tech MiniMag USB Reader	1	$62.00	$0.00	$62.00	$0.00	$0.00	$0.00
Power Supply	1	$40.00	$0.00	$40.00	$0.00	$0.00	$0.00
Printer (TM-S9000)	1	$1,600.00	$0.00	$1,600.00	$0.00	$0.00	$0.00
Tyler Secure Signature System with 2 Keys	2	$1,650.00	$0.00	$3,300.00	$0.00	$0.00	$0.00

Conversions

Detailed Breakdown of Conversions (included in Contract Total)

Description	Unit Price	Unit Discount	Extended Price
Accounting Opt 1 - Actuals - B	$1,000.00	$0.00	$1,000.00
Accounting Opt 2 - Budgets - B	$1,000.00	$0.00	$1,000.00
Accounting Standard COA - B	$2,000.00	$0.00	$2,000.00
Accounts Payable Opt 1 - Checks - B	$1,200.00	$0.00	$1,200.00
Accounts Payable Opt 2 - Invoice - B	$1,800.00	$0.00	$1,800.00
Accounts Payable Standard Master - B	$1,200.00	$0.00	$1,200.00
Fixed Assets Opt 1 - History - B	$1,000.00	$0.00	$1,000.00
Fixed Assets Std Master - B	$2,000.00	$0.00	$2,000.00
General Billing Opt 1 - Recurring Invoices - B	$1,680.00	$0.00	$1,680.00
General Billing Opt 2 - Bills - B	$3,500.00	$0.00	$3,500.00
General Billing Std CID - B	$1,000.00	$0.00	$1,000.00
Inventory Std Master - B	$2,400.00	$0.00	$2,400.00

Payroll - Option 10 Certifications - B	$1,400.00	$0.00	$1,400.00
Payroll - Option 11 Education - B	$1,400.00	$0.00	$1,400.00
Payroll - Option 1 Deductions - B	$1,800.00	$0.00	$1,800.00
Payroll - Option 2 Accrual Balances - B	$1,500.00	$0.00	$1,500.00
Payroll - Option 3 Accumulators - B	$1,400.00	$0.00	$1,400.00
Payroll - Option 4 Check History - B	$1,200.00	$0.00	$1,200.00
Payroll - Option 5 Earning/Deduction Hist - B	$2,500.00	$0.00	$2,500.00
Payroll - Option 6 Applicant Tracking - B	$1,400.00	$0.00	$1,400.00
Payroll - Option 7 PM Action History - B	$1,400.00	$0.00	$1,400.00
Payroll - Option 8 Position Control - B	$1,400.00	$0.00	$1,400.00
Payroll - Option 9 State Retirement Tables - B	$1,400.00	$0.00	$1,400.00
Payroll - Standard - B	$2,000.00	$0.00	$2,000.00
Permits and Code Enforcement - Option 1 - C	$3,000.00	$0.00	$3,000.00
Permits and Code Enforcement - Option 2 - C	$2,000.00	$0.00	$2,000.00
Permits and Code Enforcement - Standard - C	$2,000.00	$0.00	$2,000.00

Description	Unit Price	Unit Discount	Extended Price
Project Grant Accounting Opt 1 - Actuals - B	$1,000.00	$0.00	$1,000.00
Project Grant Accounting Opt 2 - Budgets - B	$1,000.00	$0.00	$1,000.00
Project Grant Accounting Standard - B	$2,000.00	$0.00	$2,000.00
Purchasing - Purchase Orders - Standard - B	$1,800.00	$0.00	$1,800.00
Real Estate - Standard - C	$12,000.00	$0.00	$12,000.00
Utility Billing - Option 1 Services - B	$2,500.00	$0.00	$2,500.00
Utility Billing - Option 2 Assessments - B	$1,200.00	$0.00	$1,200.00
Utility Billing - Option 3 Consumption History - B	$2,000.00	$0.00	$2,000.00
Utility Billing - Option 4 Balance Forward AR - B	$3,500.00	$0.00	$3,500.00
Utility Billing - Option 5 Service Orders - B	$1,200.00	$0.00	$1,200.00
Utility Billing - Option 6 Backflow - B	$1,200.00	$0.00	$1,200.00
Utility Billing - Standard - B	$3,000.00	$0.00	$3,000.00

Project Structure

The Munis division of Tyler Technologies, Inc. conducts the overall project in several Phases. A phased approach helps to ensure that system prerequisites are completed and available for other applications and reduces stress on the organization.

Phase	Module(s)	Begin Date	Go-Live Date
Phase I	Financials	July 2014	May 2015
Phase II	Payroll/HR	April 2015	October 2015
Phase III	Revenue	July 2015	April 2017

Project Phases Overview

Tyler, in partnership with the Clarke County, VA, will place into production the Tyler software product suite and other contracted third-party supporting products, which includes, and is limited to, the following modules

Overall:

- Workflow
- Tyler Forms Processing
- Munis Office
- Tyler Reporting Services
- System Administration

Phase I

- General Ledger
- Budgeting
- Accounts Payable
- Project & Grant Accounting
- Requisitions
- Purchase Orders
- Inventory
- Fixed Assets
- Interface to BMI Asset Phasing
- Contract Management
- Cash Management
- Purchasing
- Tyler Content Management for Munis
- Student Activity Accounting

Phase II

- Applicant Tracking
- HR Management
- Payroll w/ESS

Phase III

- Accounts Receivable/Cash Receipting
- General Billing
- Permits & Code Enforcement
- Tax Billing
- CAMA Bridge
- Utility Billing
- Tyler Cashiering
- VA Income Tax
- Maplink GIS Integration

Project Management Assumptions

The following assumptions apply for Project Planning purposes and for defining the Project.
At the initiation of the Project, Clarke County, VA Executive sponsors will confirm buy-in for this Project by issuing an executive mandate or mission statement to all departments stating the importance and priority of supporting this Project.
Any modifications or enhancement requests not expressly stated or noted in the contract will be deemed not within scope. Modifications or enhancements requested after contract signing have the potential to change cost, scope, schedule and live dates for project Phases. Modification or enhancement requests not in scope must follow the Project Change Request process, as outlined in the Schedule Management Plan.
The Tyler Project Manager is responsible for the initial development and life-cycle maintenance of the Tyler Implementation Phase Project Plan (Plan). The Clarke County, VA is responsible for participating in development and definition of the Plan, schedule planning, resource assignments, and approval of the final baseline Plan.
Both Tyler and the Clarke County, VA are responsible for adhering to and executing the project in accordance with the schedule and budget defined in the approved Plan. In the event either party finds that significant variance to the planned schedule may occur or is occurring, then Tyler and the Clarke County, VA Project Managers are responsible for determining the necessary corrective actions and updating the Plan accordingly.
Microsoft® SharePoint is the tool used to create and maintain the Plan. Tyler assumes that the Clarke County, VA, at a minimum, has the Internet tools necessary to read or view materials on the SharePoint site.
In the event the Clarke County, VA may elect to add and/or modify business policies during the course of this Project, then such policy changes are solely the Clarke County, VA's responsibility to define, document, and implement.
In support of the overall project management activities, the Clarke County, VA will:

- Appoint a Project Manager with overall responsibility for resources and with the authority to ensure decisions and commitments are made and communicated to the Tyler Project Manager in a timely and efficient manner.

- Communicate to the Tyler Project Manager on the progress of internal deliverables and any deviation that would affect Tyler's ability to meet the Project schedule.
- Ensure that individuals with the authority to represent the Clarke County, VA and to provide information needed by Tyler are available when necessary, attend meetings as required, and perform all activities assigned.
- Provide technical documentation and answer questions pertaining to systems with which Tyler is to interface (either through web services or import/export) and data that is to be converted into Tyler format.
- Maintain and manage a Project Risk Register. This document records potential risks to Project success and defines a risk mitigation approach. On a regular basis, the Tyler Project Manager and the Clarke County, VA Project Manager will review this log to ensure risks are being adequately addressed.

In the event the Tyler Project Manager and the Clarke County, VA Project Manager are unable to reach a mutually agreeable resolution to project issues or concerns, then the following escalation process will be followed:

- The Clarke County, VA will advise the Tyler Project Manager of the need for escalation, then contact the Tyler Regional Manager, <<Tyler Regional Manger Name>>, to present concerns and solicit resolution.
- If resolution is not reached at this level, escalation may continue to Chris Webster, Tyler Vice President of Implementation

Working together, the Tyler and the Clarke County, VA project team will:

- Place all purchased Tyler modules in a Verification/Test, Train and Live environment.
- Assist in refining business procedures in accordance with the features and functionality of the Tyler software.
- Define requirements for Tyler customization for purchased functional modifications, imports, exports, and interfaces with third-party systems.
- Assist in identifying contracted customized reporting needs.
- Coordinate the definition and verification of the purchased Tyler Forms libraries.
- Convert legacy system data into Tyler.
- Perform system integration and acceptance testing according to the Tyler Quality/Test Plan (detailed in the Quality/Test Management Plan).
- Assist in transitioning business operations into the live environment.
- Support post-implementation operations.

Implementation Assumptions for all Tyler modules

- Installation is handled by the Tyler Installation Team and the Clarke County, VA.
- Tyler will assist in the selection and definition of functional configuration options.
- The Clarke County, VA, with Tyler support, is responsible for the testing of selected configuration options.
- The Clarke County, VA, through data testing, will approve the functional configuration options and setup.

- The Clarke County, VA, with Tyler support, will conduct configuration testing and approval using sample data prior to conversion data loading or verification.
- Tyler will advise the Clarke County, VA on Tyler Workflow setup applicable to the Tyler applications deliverables (for example, approvers, business rules, and so on).
- Tyler will provide conversion specifications and will review instructions for its completion (if applicable and purchased).
- The Clarke County, VA will import and verify the converted data.
- The Clarke County, VA is responsible for verifying conversion data.
- The Clarke County, VA will approve the final converted data.
- The Clarke County, VA will be trained on interface options throughout the system.
- The Clarke County, VA once trained will work with third party systems to get interface testing data in an approved format.
- The Clarke County, VA is responsible for testing and validating interfaces.

Client Project Plan Assumptions

Throughout the course of the Project, Tyler will identify assignments for the Clarke County, VA to perform. Task assignments may include such activities as data entry, practicing training exercises, functional testing, conversion validation, and so on. The following outlines major assumptions regarding these activities:

- Each task will be identified and scheduled within the Project Plan and available in a Task view on the SharePoint site.
- Tyler will clearly define each assignment, the project team member responsible, and assignment due date.
- The Clarke County, VA Project Manager is responsible for ensuring the assignments are accomplished in accordance with the timeline defined in the Project Plan.

Personnel Assumptions

- Identified project team resources will be available for project work in accordance with the schedule defined within the Plan.
- Project team members should not be required to spend time on other company business in lieu of or to the detriment of their project responsibilities.
- Project team members will be knowledgeable and experienced within their assigned functional area.
- Additional subject matter experts will be made available as necessary to address specific functional and procedural issues that might arise and require expertise beyond that of the immediate project team.
- To ensure knowledge and performance continuity, project team will be assigned to the Project for the entire duration of the Project Phase.
- The project team is empowered to answer and resolve business issues on behalf of the Clarke County, VA.

Technical Support Assumptions

While the technical infrastructure setup and software installation are activities beyond the scope of the Tyler Implementation project, technical preparations and deliverables have crucial ramifications for the Tyler Implementation project. Therefore, it is important that the following assumptions be satisfied:

- The Clarke County, VA will have in place all hardware, software, and technical infrastructure necessary to support the Project.
- The Tyler modules will be installed, functional, and available to project team prior to the first hands-on sessions.
- Network access to the Tyler modules, printers and the Internet will be available to all applicable Clarke County, VA and Tyler project staff.
- The Clarke County, VA, upon request from the Tyler Project Manager, will coordinate MIS/IT functions such as system backups, loading releases and software updates, hardware installation, operating system setup and maintenance, and system administration. The Clarke County, VA may be requested to perform these tasks in a timely manner in association with specific implementation requirements.

SAAS Assumptions

- User names are determined by SAAS standards. The authorized Munis users will be assigned a user name that begins with the client unique number followed by the first character of the first name and concluded with the first three characters of the last name.
- The Clarke County, VA will adhere to the Munis server password policy. This includes, but is not limited to, definitions on age maximums and password criteria.
- The Clarke County, VA will have access to SAAS Support during posted SAAS Support hours, Monday through Friday, 8:00 AM through 6:00 PM EST.
- The Clarke County, VA will provide a list of all persons that are authorized to contact SAAS on the SAAS Administration Form.

System Administration Assumptions

The following outlines major assumptions and activities surrounding the System Administration implementation Phase of the Project:

- Tyler will advise the Clarke County, VA on security and user setup features.
- The Clarke County, VA will define and setup menu and end-user security options.
- The Clarke County, VA through data testing will approve the functional configuration options and setup.

Conversion Assumptions

The following outlines the major assumptions and activities surrounding the conversion processes.

- The conversion department at Tyler reviews the contract to determine which conversions were itemized in the contract, and determine whether additional tasks will be required and/or desired.

- The Tyler Project Manager develops the schedule for sending initial data and supporting documentation and sets timelines for return of the converted data. Timing is critical to meeting your dates for going live.
- The Clarke County, VA delivers the data files to the conversion department via an ftp site and notifies the Tyler Project Manager the name(s) and phone numbers of user and technical contacts who can answer questions regarding details of the conversion data.
- Tyler will provide error reports with explanation of discrepancies which may create a situation that will require maintenance.
- The first pass of the COA conversion will be returned to the client within 2 weeks. All other conversions will have a first pass returned to the client within 6 weeks. Subsequent passes of all conversion will be returned to the client within 2 weeks. Go-live passes will be returned to the client within 2 days.
- It is the client's responsibility to load the data with instructions from Tyler and validate that the data is accurate and complete.
- The Clarke County, VA will provide all legacy data in Tyler standard conversion file formats.
- Tyler will provide definition of the standard file formats.
- The Clarke County, VA and Tyler will determine critical legacy sources for validation, for example, reports, selected records, and so on.
- The Clarke County, VA will generate required reports for validation in conjunction with data extraction.
- The Clarke County, VA will load data into Training database, and all verification will occur in the Training database.
- Prior to the final conversion process the Clarke County, VA will suspend activity in their legacy system in accordance with the Project Plan. Tyler and the Clarke County, VA will mutually agree as to when this suspension period should begin.
- A sign-off will be required from the Clarke County, VA prior to loading any conversion in the Live database. The Clarke County, VA will ensure that data is not loaded into the Live database until approval of the conversion has been received and verification has been performed within the Training database.
- The Clarke County, VA will not attempt to load data via scripting in lieu of a conversion or manual entry. Doing so may void the support contract.
- Clarke County will be billed for conversions performed only.

Tyler Forms Assumptions

The following outlines major assumptions and activities surrounding the Tyler Forms Processing implementation Phase of the Project:

- Tyler will implement Tyler Forms as applicable
- The Tyler Project Manager coordinates Tyler Forms Implementation to insure the Clarke County, VA's requirements and schedule are communicated in a timely manner.
- The Clarke County, VA is responsible for responding to Tyler Forms information requests in a comprehensive and timely manner.
- The Clarke County, VA agrees to sign-off on form designs no later than sixty (60) days before go-live.

- The Clarke County, VA will approve the print solution options selected.
- Tyler will support the Clarke County, VA's verification and test of the delivered print solutions.
- The Clarke County, VA will provide final approval of the print solutions.
- Tyler Project Manager, with the assistance of the Clarke County, VA Project Manager, will monitor the progress of the Tyler Forms deliverables to ensure compliance with the Project Plan.

Communication Plan

A Communication Management plan outlines the information and communication needs of the project stakeholders.

The goal of the Communications Management Plan is to document the following:

- Stakeholder communication requirements
- Type of information to be communicated
- Vehicles for communication
- Frequency of communication
- Owner of the communication
- Intended audience for communication
- Purpose of communication

Stakeholder Communication Requirements

Clarke County Joint Administrative Services Board
The JAS Board requires communication on matters which will change the scope of the project and its deliverables.

Information Needed by Client Management	Input Needed from Client Management
Project plan	Elected Board Mandate
Project schedule	
Project status updates	
Budget information	
Change requests	

Clarke Project Manager (JAS Director)
The Project Manager is the primary communicator for the project, distributing information according to this Communications Management Plan.

Information Needed by Clarke Project Manager	Input Needed from Clarke Project Manager
Status of tasks	Agenda input for Status Meetings
Project plan	Schedules for internal resources
Project schedule	Blackout dates
Trip reports	Client task assignments
	Change requests

Functional Leaders

The Functional Leaders require communication on the project schedule and tasks. Functional leaders will communicate policy and procedure decisions to core and end users.

Information Needed by Functional Leaders	Input Needed from Functional Leaders
Project schedule	Status of tasks
Project plan	Risks
Project status	Functional requirements
Tasks	Functional issues
	Lessons learned

Change Management Team (JAS Board)

The Change Management Functional Leaders are responsible for the people side of change. They will support the change management communications of the organization.

Information Needed by Change Management Leaders	Input Needed from Change Management Leaders
Project schedule	Department specific change management communication
Project status	Organization wide change management communication
Project vision	Feedback from departments to provide to the Project Team
Who will be affected by the project, when they will be affected, and how they will be affected. May be different for different staff members/departments.	
Feedback from departments	

Project Team

The Project Team is comprised of the Executive Team (Ash, Bishop, Roper, Judge), the Tech Team (Russell, Fuller, Shewbridge), and the Functional Leads (itemized in the Scope of Work).. The project team needs to have a clear understanding of the work to be completed and the framework in which the project is to be executed.

Information Needed by Project Team	Input Needed from Project Team
Project schedule	Status of tasks
Project status	Risks
Tasks	

All Stakeholders
Stakeholders include all individuals and organizations that are impacted by the project. These are the stakeholders with whom we need to communicate and are not included in the other roles defined in this section

Information Needed by Stakeholders	Input Needed from Stakeholders
Executive Mandate	Departmental issues/requirements
Target Live Dates	
Project Updates	
What's in it for me	

Tyler Project Manager
As the person responsible for the execution of the project, the Project Manager is the primary communicator for the project distributing information according to this Communications Management Plan.

Information Needed by Tyler Project Manager	Input Needed from Tyler Project Manager
Conflict dates	Project plans
Status of tasks	Schedules
Change requests	Status reports
Risk changes	Tyler and client task assignments

Tyler Consultant
Consultants will be the primary Tyler contact for Functional Leaders and End Users during analysis and training. They will distribute information on the training and status of tasks via trip reports posted to the share point site.

Information Needed by Tyler Consultant	Input Needed from Tyler Consultant
Project schedule	Client task assignments
Project plan	Trip reports
Project Status	Training agendas

Communication Plan Matrix

Vehicle of Communication	Audience	Frequency	Medium	Owner(s)	Date Delivered	Change Mgmt. Message	Expected Result
Kickoff Meetings	Client Project Manager, Functional Leaders, Project Team, Stakeholders	Start of overall project and each sub-project	Presentation	Tyler PM		How the change will be implemented	Client will receive high level information from Tyler PM to assist in planning and executing project.
Phase Planning Meetings	Client Project Manager, Phase Functional Leaders,	Start of overall project and each sub-project	Presentation and Planning Document	Tyler PM, Client PM			Roles and responsibilities will be outlined as well as Scope review, communication streams, Quality Assurance processes and initial schedule development.
Board Mandate	Organization	Start of overall project and each sub-project, if necessary	Letter/Memo	JAS Board		Develop a brand; what, why, and how the change is happening; who will be affected by the change	Organization will understand the purpose and importance of the project as well as the level of commitment required to make it successful.
JAS Board Meetings (JointTechnology Governance)	Client Management	Monthly	Status Reports, Budget Reports	Client PM			Provide overall project direction, executive sponsorship, and support in the adoption of new technology and business processes. Review project status.
Client Project Team Meetings	Relevant Functional Leaders, Executive Team, Tech Team	Weekly	Status Reports	Client PM			Provide key project participants and client management with detailed information regarding project task status, schedules, progress, and budget.

Tyler Implementation Status Meetings	Tyler PM and Client PM	Bi-Weekly until 90 days from LIVE, then Weekly. Mondays at 9:00 am.	SharePoint, Status Report Agenda, Issues Lists, Schedules, Deliverables	Tyler PM			Provide effective and timely communication to the Client PM and Functional Leaders on the status of the Tyler Project at a detailed level. The goal is to keep the project team abreast of the current project status, project issues, upcoming events, and project milestones at a detailed level. Delivery point will be to Client PM for distribution to the Project Team.
FAQ Document	Organization	Evolving	Hardcopy, SharePoint	Client PM		Provide a feedback mechanism: blog? Wrike?	Answer frequently asked questions about the project and its benefits
Project Plan	Client Project Manager, Functional Leaders, Project Team	Evolving	SharePoint	Tyler PM			Communicate clearly defined tasks, milestones, schedules and dependencies.
Project Sign-Offs	Client Project Manager, Functional Leaders, Project Team, Tyler PM	Evolving	Hardcopy, or SharePoint Electronic Approval	Tyler PM			Provide clear acceptance and authorization to proceed to next step in implementation.
Project Web Space or Shared Directory	Functional Leaders, Project Team, Organization, Community	Evolving	SharePoint 70 Accounts?	Client PM		Project branding; what, why, and how the is change happening; when training will begin, who will be trained; where to find information	Provide information and support for the project goals to the community and organization as well as providing access to key documents, schedules, and so on.

Client SharePoint Site	Tyler PM, Tyler Resources, Client Project Team	Evolving	SharePoint	Tyler PM, Client PM			Provide project information including agendas, status reports, trip reports, project tasks and schedule
Newsletter	Organization	Quarterly	Email	Client PM		Project branding; what, why, and how is the change happening; who will be affected by the change; when training will begin, who will be trained; where to find information	Provide project updates and news
Training Notifications	Functional Leaders, Organization, Department Heads, Super Users, End Users	Ongoing	Email	Client PM		When training will begin, who will be trained	Notifies Department Heads and End Users of upcoming training sessions
Agendas	Functional Leaders, Organization, Department Heads, Super Users, End Users	At least two weeks prior to any session	SharePoint	Client PM			Notification of specific agenda for any analysis session, training session or meeting.

Quality Management Plan

A Quality Management/Testing Plan establishes processes and activities to ensure that project objectives outlined within the Scope Management Plan are successfully implemented. Any Quality Management/Testing Plan must work to address both the project and the product.

The goal of the Quality Management Plan is to document the following:

- Specific tests to be used on the Clarke County, VA Project
- Critical testing milestones.
- Testing roles and responsibilities
- Testing measurement and tracking

Process

It is imperative that a Quality Management Plan and System Testing Plan be put into practice as part of the Project. The plan should include all of the processes required to ensure that the goals for the project are fully satisfied. The overall plan may include the following elements:

Static Environment Testing

Tests policy and procedure decisions made during knowledge transfer. Conducted with functional leaders using sample client data and customized scripts. Acceptance is required to move to the implementation phase.

Integration/Unit Testing

Observation of inter-module data flow and effect, especially as it relates to the General Ledger. Integration testing occurs throughout the implementation via standard training unless testing days are contracted and specifically allocated for that purpose.

Parallel Testing (Payroll and Utility Billing)

Replicates live processes in a training environment, and results are compared with live results to determine discrepancies. Parallel testing will be scheduled as part of PR/HR and Utility Billing Implementations. It is recommended that clients conduct additional parallel processing on their own.

Interface Testing

Standard Munis import and export programs will be covered during Implementation. Testing of third-party data flow and effect will be the client's responsibility unless testing days are contracted and specifically allocated for that purpose.

User Acceptance Testing

User Acceptance testing occurs throughout the implementation via standard training unless testing days are contracted and specifically allocated for that purpose.

Conversions Proofing

Validating that converted data is complete and accurate and meets the needs of the client.

Forms Proofing

Validating form design and distribution.

The Benefits of Testing

As an expected benefit from the completion of these tests, the following will also be achieved.

- End-users will gain extensive product experience, develop a high-level of confidence in the Munis Product and understand their specific functions within the system.
- The infrastructure of hardware and network design will be thoroughly tested.
- Modifications and interfaces are fully integrated into the Munis product.
- A managed Issues List will be fully quantified.

The Munis Testing Environment

Interfaces, conversions and other data and programmatic elements will be tested in the Training environment. This environment will also serve as the User Acceptance Test environment.

The Training environment will provide the structure and supporting programs for User Testing to be performed throughout the duration of the Project. The desired result of the User Testing process is Functional Goal Acceptance achieved through managed issue identification, resolution, and testing.

Type of Testing	Audience	Timing	Method	Owner(s)	Guidance/ Support	Dates to be Delivered	Expected Result
Static Environment Test	Client Project Manager, Functional Leads	During each phase after As Is and To Be analysis has been completed	Training Database using scripts	Tyler Consultant	Client Functional Leads, Client PM		Client will be able to validate analysis decisions by seeing processes performed using their own data.
Conversion Proofing	Client Project Manager, Functional Leads, Technical Lead	After each pass of data is returned	Error reports delivered via email; proofing via reports run on Training database	Client Functional Leads, Technical Lead	Tyler Consultant, Tyler PM	Ongoing, please refer to Project Plan	Data will be validated and additional correcting passes made as needed until data is approved by client. Processes will be tested using converted data to ensure accuracy.
Forms Proofing	Client Project Manager, Functional Leads	As forms are approved and loaded on forms server	Form output from Training Database	Client Functional Leads, Technical Lead	Tyler Consultant, Tyler Forms	Please refer to Project Plan	Form design and distribution are validated. Checks are sent to bank for validation. Design options are tested and finalized.
Integration/Unit Testing	Client Project Manager, Functional Leads, Technical Lead	Occurs throughout all process training. Specific days scheduled for third-party integrations	Standard training sessions in the Training Database	Client PM, Client Functional Leads	Tyler PM, Tyler Consultant	Ongoing, please refer to Project Plan	Validation of module integration as well as validation that third-party integrations are operational and returning the expected result.
User Acceptance Testing	Client Project Manager, Functional Leads, End Users	Occurs throughout all process training.	Standard training sessions in the Training Database	Client PM, Client Functional Leads	Tyler PM, Tyler Consultant	Ongoing throughout project	Functional Leads and End Users validate process flow.

Parallel/Trial Run Testing	Client Project Manager, Functional Leads	90-days prior to go-live	Tyler lead sessions in the Training Database.	Tyler Consultant, Client Functional Leads		Validation that there are no discrepancies between Munis and the legacy system before live processing.
User Competency Testing	Client Core Users, End Users	At the end of each training phase	City conducted sessions in the Training Database sessions using scripts	Client PM, Client Functional Leads	Tyler PM	Functional Leads and End Users validate that they can run key processes

Action Plan

Plan Approach

The following outlines the Munis test planning approach:

- Work with the Clarke County, VA Project Team to determine which processes, interfaces, and modifications need to be tested within the appropriate scenario processing.
- Work with the Clarke County, VA Project Team to identify Project Team members, and functional leaders, to define roles and responsibilities in performing scenario processing.
- The Clarke County, VA's Project Team will identify and communicate to select Product Specialists the assigned testing scenarios to be executed with assistance from Tyler Implementation Staff.
- The Clarke County, VA's Staff and Tyler Project Team will review and assign priorities for response to identified program or procedural issues that result from completed testing scenarios.

The Clarke County, VA's Project Team may choose to assign a Test Coordinator to work with Tyler Project Team. The responsibilities include:

- Working with Tyler Project Team to oversee all functions of the testing process. Monitoring the quality and timeliness of the overall testing effort.
- Facilitating testing completion by maintaining momentum during process. Checking that tests are completed in the order necessary to thoroughly sign-off on process.
- Ensuring that all reports of issues are submitted to the Tyler and the Clarke County, VA Project Manager in a complete and timely manner.
- Review scenario processes and modify as necessary to align with any changes to policies and procedures.
- Expectations of Tyler related to successful completion of Testing Phase are identified as follows:
  - Provide training to the Clarke County, VA staff.
  - Develop baseline scenario processes
  - Support the Clarke County, VA testing plan

Measurement & Tracking

- Priority 1 Critical Issue - Cannot proceed without correction
- Priority 2 High Issue - Can proceed but needs correction before Live
- Priority 3 Medium Issue - Can proceed with Live Processing but fix needs to be delivered to comply with ERP goals
- Priority 4 Low Priority Issue - Can proceed with Live, new desired functionality.

Once corrections have been delivered, the Clarke County, VA's Project Team and Tyler Project Manager will determine if Repeat Testing can continue from stopped point or, if it must be restarted.

The Clarke County, VA's Project Team will schedule and outline Stress Testing scenarios.

Tyler will require a final sign-off/approval prior to going live on any module. This sign-off will outline the status of any remaining open issues related to the module, confirming the issue status and the associated priority code. The Clarke County, VA's Project Team and the Tyler Project Team will review all items and make a decision as to the ability to begin Live Processing in Munis. The sign off will signify the end of system test phase for the module. The decision to delay Live Processing should not be based on issues whose status is a Priority 3 or 4.

Sample Test Tracking Grid.

Type of Testing	Owner(s)	Date Delivered	Issues Encountered	Priority	Resolution
Static Environment Test	Tyler Implementation Consultant				
Conversion Validation & Testing	Business Leads, Technical Lead	Ongoing, please refer to Project Plan			
Forms Testing	Client Functional Leads	Please refer to Project Plan			
Integration/Unit Testing	Client PM, Functional Leads	Ongoing, please refer to Project Plan			
User Acceptance Testing	Client Project Manager, Functional Leads	Ongoing throughout project, pilot training scheduled for initial end user exposure			
Pre-Live verification	Tyler PM				

Testing Scripts

Tyler will provide sample Test Scripts for the Clarke County, VA to review and customize for their testing purposes. Available scripts will be loaded in the Testing folder on Clarke County, VA SharePoint site as needed.

The Munis Testing Conclusion

Clear communication, recordkeeping, and analysis between the Clarke County, VA's Project Team, Tyler Project Manager and Tyler Implementation Teams are critical in order to move through the Testing Phase both successfully and in a timely manner. A member of these teams will need to identify the issues and then determine what type of issue resolution is necessary. Most issues can be categorized as they relate to the following:

- Module Design or Setup
- Best Practice Re-engineering.
- Change in scope
- Software modification requests

Issue tracking, resolution accountability, timely testing, and completed issue resolution are absolutely necessary in successfully completing the Clarke County, VA's Project. The Testing Phase is a shared responsibility and must be recognized as such.

Risk Management Plan

The following tables should be customized for this project, based on the decisions made from reading the Risk Management Planning document.

Risk Identification Procedures

What	Owner	Time Estimate
A meeting with all team members and subject matter experts (SME) will be held to identify risks using the Prompt List technique. The Tyler PM or Client PM will update the Risk Register with the identified risks, causes and effects.	Tyler PM Client PM	1-2 hour session 4 hours documentation
Delphi Technique: We will query each of the Board Members and Department Heads to identify risks associated with this project. They will be given a week to respond. After they return all submissions, we will send the total risk list to them for a one-time only review. They will be given an additional week for review and response. The Tyler PM or Client PM will update the Risk Register with the identified risks, causes and effects.	Client PM sends communications; Tyler PM compiles results in Risk Register	2 hours management & documentation 1 hour effort per Board Member or Dept. Head 2 weeks lag
E-mail: At the end of each of the above activities, everyone will be asked to e-mail the PM with any additional opportunities or risks that occur to them after the session. The Tyler PM or Client PM will update the Risk Register with the identified risks, causes and effects.	Stakeholders Tyler PM Client PM	1 hour for responses 1 hour documentation

Risk Analysis Procedures

What	Owner	Time Estimate
Review: The Client PM will ask the core team to review the risks to determine if they understand the risks enough to score. The team should notify the PM of any risk they are unsure of and the PM can clarify or get more information from the originator. The team should enter the probability and impact scores on separate spreadsheets in preparation for the risk meeting. The team will have 3 days to perform the review.	Client PM	2 hours to review 2 hours management 3 day lag
Scoring: The project team will determine the average of all impact and probability scores for each risk and use these to calculate the risk score and document them on the risk register.	Project Team	2 hours
Anything with a probability of "very likely" (5) will be considered a fact and managed in the Project Plan. Threshold 2: Anything with a risk score lower than 10 will be included on the risk register with a status of "watch list".	PM	1 hour

Risk Response Planning Procedures

What	Owner	Time Estimate
Risks with scores higher than 14 will be assigned to the core project team, SMEs, and management if necessary. Each risk owner will be assigned to develop strategies avoid, if possible, or mitigate/transfer the risk, or to increase the chance for an opportunity. Risk owners are given 1 week to complete.	Team SMEs Management (if needed)	4 hours 5 day lag
The project team will discuss the risk response strategies and agree on the response to be taken should a risk trigger occur, or if it's about to occur. These responses should be documented in the risk register.	Team	2 hours

Risk Monitoring and Control Procedures

What	Owner	Time Estimate
Monitoring: Risk owners are responsible for monitoring their risks and notifying the PM via e-mail when a trigger occurs and that the response plan has been initiated.	Risk Owners	4 hours
New Risk Identification: Any stakeholder can	Stakeholders	1 hour

identify additional risks. The stakeholder should notify the PM of the new risk (or possible risk) via e-mail.		
Audits: The PM will be responsible for overseeing risk activities and ensuring the risk register is updated.	Client PM Tyler PM	2 hours per month
Review: The project team will review the project's high priority risks biweekly and all risks monthly.	Project Team Tyler PM Client PM	1 hour per month
Reporting: Risks will be reported in two ways. First, the Tyler PM and Client PM maintain a Risk Register on the project SharePoint site. The Risk Register will contain a list of risks identified for the project, the priority of the risk, the risk owner, and a current status of any active risks. Second, the biweekly status report will contain a summary of the high priority risks and any new risks identified and added to the Risk Register.	Tyler PM	1 hour per month

Schedule Management Plan

A Schedule Management Plan involves defining the processes of how the master project schedule will be established, controlled and updated.

The goal of the Schedule Management Plan is to document the following:

- Roles and responsibilities
- Schedule development
- Schedule control
- Schedule change review and approval

Schedule Roles and Responsibilities

Task	Owner
Provide Conflict Dates to Tyler PM	Client PM
Create initial Project Plan w/ specific dates and attendees for each session, as well as due dates for each assigned task	Tyler PM
Review and approve schedule	Client PM
Notify Client and Tyler PM of task progress	Client Functional Leaders, Tyler Consultants
Monitor schedule for potential issues	Client Project Team, Tyler Project Team
Submit schedule change requests	Client PM, Tyler PM
Review schedule changes for impact on time, scope cost, and performance	Client PM, Tyler PM
Approve changes to schedule with no impact on target live date, costs of project, or scope of products/services being implemented	Client PM, Tyler PM
Approve changes to schedule where there is an impact on the target live date, costs of project, or scope of products/services being implemented	Client PM, Tyler PM

Schedule Development

Project schedules will be created by the Tyler Project Manager and sent to the Clarke County, VA Project Manager for review and approval. Once approved the Project Plan will be developed using Excel and loaded to the Clarke County, VA SharePoint. The Clarke County, VA project team and resources must agree to the proposed work package assignments, durations, and schedule. The schedule should be approved as a whole and both teams committed to following the schedule.

The following will be designated as milestones for the project schedule:

Session	Target Development Date	Target Approval Date
Schedule Project Kick-off		
Schedule Planning and COA Sessions		
Schedule Analysis and Configuration		
Schedule Education Sessions (includes) • System Administration Training • Setup Training • Processing Training • Train the Trainer Training • End User Training		
Schedule Go Live Planning Sessions		
Schedule Post Live Training		
Acceptance of final deliverables		
Transition to support		

Schedule Control

It is important that the implementation schedule be closely monitored and controlled throughout the project. Project progression as well as necessary changes will be discussed during regular status meetings.

Possible schedule control tasks are listed below:

Schedule Control Tasks	Meetings
Review Project Plan tasks and milestones	
Discuss overall project progression	
Assess need for schedule changes	

Schedule Change Process

Requests for schedule changes should follow a formal process so they can be reviewed for impact on time, cost, scope and performance.

Schedule Change Process

Step	Resource	Specifics
Change Request	Any stakeholder	Identify reason for change on Change Request Form and submit to the Client PM
Change Request Review	Client PM Tyler PM	Review change request for impact on time, cost, scope, and performance
Change Requests Approval	Client PM Tyler PM Steering Committee	1. If impact on project is under the predetermined threshold, the change can be approved by the Client and Tyler PM's 2. If impact on project is over the predetermined threshold, the change should be submitted to the Steering Committee for approval
Change Order	Client PM Tyler PM	If a change requires a contract change order, the Tyler PM will request that one be sent to the Client PM for review and signature.
Change Implementation	Client PM Tyler PM	Update Project Plans and schedules – Tyler PM Communicate changes to the team – Tyler and Client PM. Record completion of Change Request – Tyler PM

Resource Plan

A Resource Plan establishes and includes the processes that organize and manage the project team and the necessary physical resources for the project tasks. The project team is comprised of the people who have assigned roles and responsibilities for completing the project. The physical resources are comprised of the facilities needed to ensure the completion of all necessary tasks for the project.

The goal of the Resource Management Plan is to document the following:

- Roles and responsibilities
- Physical resource requirements
- Project Team members
- Facilities and tools to be used throughout the Project
- Miscellaneous resource items

Tyler Project Team Roles and Responsibilities

Tyler Project Manager

- Provide a Project Plan for each phase
- Work with the Clarke County, VA PM to coordinate an implementation schedule
- Schedule Tyler resources for each phase
- Coordinate conversion services with appropriate Tyler departments
- Coordinate services with Tyler Forms
- Oversee project and monitor progress with the Clarke County, VA PM
- Hold regular conference calls with the Clarke County, VA PM to review status and progress of project and to identify any outstanding issues.
- Manage change orders
- Initiate change requests to project management plans as requested by the Clarke County, VA

Tyler Implementation Consultant

- Perform verification testing
- Deliver System Administration Training
- Conduct Knowledge Transfer Analysis
- Perform system design and set up table analysis
- Participate or conduct Static Environment Testing
- Assist with Tyler Forms design
- Assist with data conversion analysis
- Train the Clarke County, VA in data conversion validation process
- Assist in testing and parallel process
- Conduct Super User training

- Deliver pre-live services
- Provide go live assistance
- Provide post live reconciliation and reporting training

Clarke County, VA Roles and Responsibilities

The Clarke County, VA Project Manager

- Identify and communicate to Tyler PM requirements for a successful implementation of Munis
- Coordinate with Tyler PM to develop and maintain implementation schedule which identifies specific milestones and establishes accountability
- Manage completion of Project Planning Documents
- Schedule the Clarke County, VA resources. This includes but is not limited to personnel, equipment and training rooms
- Identify additional employee training needs and request necessary schedule changes
- Ensure that employees accomplish tasks on time, including monitoring homework assignments
- Coordinate conversion file submission and proofing
- Coordinate Tyler Forms submission and proofing
- Review invoices and approve payment in accordance with the contract and associated milestones
- Oversee Project and monitor progress with Tyler PM
- Coordinate IT/MIS functions such as system backups, loading releases and software updates, hardware installation and operating system setup
- Coordinate regular internal project meetings to determine status of tasks and identify outstanding issues. Refer to the Tyler Communication Management Plan for frequency and schedule. Communicate these to the Tyler PM at each project status meeting
- Provide and facilitate 3rd party vendor communication plan and escalation process
- Initiate change orders to project management plans and provide to Tyler PM as required

The Clarke County, VA System Administrator

- Copy Live database to Training/Test databases as needed for training days
- Create any necessary conversion files to be transmitted to Tyler or 3rd Party Vendors
- Add new users and printers
- Ensure all users understand Tyler log-on process and have necessary permission for all training sessions
- Ensure network and infrastructure is sound

The Clarke County, VA Functional Leader

- Participate in appropriate analysis sessions by providing detailed policy and procedural information.
- Act as subject matter expert on selected modules
- Review analysis deliverables
- Sign off on system design and conversion files

- Actively participate in Tyler Forms design process
- Actively participate in conversion mapping and validation process
- Actively participate in all testing and parallels
- Complete all required set up tables
- Complete workflow and security templates for all end users
- Attend all training sessions or appoint an appropriate management level designee
- Practice processes learned outside of training sessions
- Conduct performance tracking and review with Tyler PM on end user Tyler competency
- Assign department resources for training and internal tasks
- Act as supervisor/cheerleader/change manager for the new Tyler process
- Identify and communicate to the Clarke County, VA PM any additional training needs or scheduling conflicts
- Help document lessons learned at end of each phase and signoff on formal acceptance for phase close-out
- Perform Live processes

The Clarke County, VA Change Management Functional Leader

- Own the change management Executive Playbook. Work with sponsorship to stay active and visible and Invite sponsorship to Executive Playbook scheduled events
- Own the Resistance Management Plan. Initiate plan when/if necessary
- Attend all change management coach training sessions
- Own the Business Process Transition Worksheet. Deliver the worksheet to impacted managers/supervisors pre-end-user training
- Participate in analysis sessions and monitor for resistance and mitigate if necessary
- Review analysis deliverables and document the process/procedure change using the Business Process Transition Worksheet
- Participate in all testing and parallels. Monitor for resistance and mitigate if necessary
- Attend all training sessions. Monitor for resistance and mitigate if necessary
- Act as cheerleader/change agent for the new Tyler processes
- Support go-live events
- Monitor project compliance after go-live. Audit and collect feedback. Report analysis findings to project management for corrective action
- Participate in the After Action Review and document lessons learned at end of each phase
- Participate in Phase Closure

The Clarke County, VA Core User

- Attend and participate in analysis sessions as necessary
- Attend all applicable training sessions
- Participate in data conversion mapping and validation as necessary
- Test system setup.
- Work to actively identify and solve problems and communicate changes that impact other users
- Complete project tasks in a timely manner.

- Become an expert Munis resource for End Users.

The Clarke County, VA End User

- Have basic competency in computer skills
- Attend all applicable training sessions
- Practice tasks
- Demonstrate competency with Tyler processing prior to go live date

Other Tyler Resources

Tyler Implementation Analysts

- Provide immediate direct support for Implementation Staff on site
- Assist in all Implementation Consultant's duties

Tyler Conversions

- Validate data files are readable
- Provide definition of the standard file formats and database schemas to aid in the conversion data mapping process
- Provide converted data with instructions for loading
- Revise results as data anomalies and exception conditions are discovered
- Add as needed based on contracts.

Tyler Forms

- Provide forms kits for all purchased forms
- Review requirements for equipment and supplies
- Provide instruction sheets and form mock-up sheets
- Conduct review of client's form mock-up sheets
- Create form designs
- Install forms software and approved forms
- Quote custom design work and deliver as agreed upon

Tyler Support

- Provide timely response to questions and issues based on call priorities
- Escalate issues to Senior Analysts and Development as needed
- Seek client confirmation of issue resolution
- Provide application support through annual support contract

Transition Services Assumptions

- A Technical Support Manager will provide an introduction to the Tyler Support process.
- Introduce the various service tools available to the Clarke County, VA, including Online Support Incidents and Community.
- Assign a Support Account Manager to work with the client on their key processes coming in the next 12 months (post go-live).
- Proactively work with new clients on their upcoming key processes and provide insight and advice for success.
- Assist in securing additional Tyler resources, if needed.
- Assist in navigating the internal departments at Tyler to help accomplish goals.

Tyler SaaS

- Provide server support for SaaS clients
- Create users on active directory
- Provide information on using Cloud Admin tool
- Load conversions
- Perform copy databases (Live to Test/Train/Verify)

Physical Resource Requirements

Analysis Facility

- Conference Room or open meeting space free of interruptions to accommodate all users comfortably
- Space for attendees to take notes and organize documents
- Internet connection
- Projector and screen
- White board/smart board or flip chart
- Speaker phone

Training Facility – Core Users and End Users

- Training environment free of interruptions
- Space for trainees to take notes and organize documents
- Internet connection
- Access to the Tyler system
- Projector and screen
- A working networked Tyler printer
- Speakerphone
- White board/smart board or flip chart
- Ideally one computer per user being trained and a trainer computer

Facility Resource Matrix

Room name/number				
Exact location				
Purpose (analysis, training, decentralized training, backup)				
Number of computers				
Is there a separate station for the instructor?				
Total capacity				
Networked printer available?				
Is there access to the Tyler system? Or estimated date for access.				
Number of internet connections (or note if wireless)				
Speakerphone?				
Whiteboard or flipchart?				
First date available				
End date available				
Is room dedicated to project? If not, who reserves it?				
Is there a permanent projector & screen? If not, who reserves them?				
Is the room locked? If so, who will have access?				
Other room considerations				

Project Team Members
Refer to Client SharePoint

Miscellaneous

Note any additional resource details specific to the site

Parking	
Hotels	
Special Passes	
Other	

Education Plan

An Education Plan outlines the process of transferring knowledge to and from stakeholders. For the Tyler Implementation, this includes the analysis and knowledge transfer process, as well as training sessions for Core Users.

The goal of the Education Plan is to document the following:

- The high level education process and various types of educational sessions included in the Tyler Implementation
- Prerequisites for each session
- Answers to specific logistical questions (how many classrooms be established, what database environment will be utilized, and so on)
- Action items to link project personnel as owners for logistical items
- Measurement criteria to be used to ensure the Education Plan has been successful

Types of Education Sessions

Analysis

Tyler employees will perform the following tasks during the Analysis sessions:

- As Is/To Be Questionnaire review
- In depth analysis of Tyler options
- Product overview demonstration

This phase will involve the Functional Leaders, Subject Matter Experts, & Key Decision Makers. The goal of this phase is to transfer high level knowledge between parties. The output will be policies and procedures related to the use of Tyler. The policies and procedures will determine the training agenda to be delivered to the end users. For example, if commodity codes are not going to be utilized within Tyler Purchasing, then the training outlines for Purchasing should remove the discussion of commodity codes.

Prerequisites:

- Questionnaires may be provided prior to analysis so that processes may be reviewed internally prior to the session.
- Internal policy documents should be reviewed and accessible during the sessions.
- Required reports should be reviewed and printed for respective session.
- Samples of any applicable outputs (AP or payroll checks, general bills, purchase orders, etc.).

Static Environment Test

The SET allows the Functional Leaders to see a working Tyler system with their own sample data before moving forward with training. Data is processed according to defined/recommended policies and procedures so that Functional Leaders can confirm assumptions and gain an overall understanding of the Tyler applications.

Prerequisites:

- Final test scripts – templates provided by Tyler Project Manager.
- Sample client data for each test (10 vendors, 10 AP invoices and sample accounts for AP SET, etc.).

Education - Munis System Admin Training
This session covers the System Administration menu options in Munis, Tyler Content Manager configuration (if purchased), Munis Self Service configuration, etc. This is intended for the staff that will be responsible for system administration. Training is conducted by the Implementation Consultant.

Education - Set-up Training
This consists of training on table and code set-up to be completed prior to processing training. The Implementation Consultant will train client on completion of set up tables and codes according to decisions made in analysis sessions. These sessions typically include Functional Leaders and Subject Matter Experts. All core users who will assist in the set up of tables and codes should attend.

Education - Processing Training
Process training conducted after analysis decisions have been made and set up is complete, or in progress. This covers the process flow from start to finish. These sessions typically includes Functional Leaders, SME's, and staff from the central departments (i.e. AP department, Payroll department, also known as Core Users) and do not include decentralized departmental users. These sessions may be conducted multiple times during a phase.

Education - Train-the-Trainer Training
Process training conducted to train the Clarke County, VA trainers on how to conduct End-User Training. The items covered are inquiries, reports, approvals, and general entry. The specific topics are to be determined in project planning and analysis, and refined prior to training the Clarke County, VA trainer(s). If desired 8-10 end users can be invited to this one time session to provide feedback prior to training the rest of the organization. Details of this training will be agreed upon and documented in the project plan for each project phase.

Education - End User Training
Process training for all decentralized or departmental users. This is the Clarke County, VA's responsibility unless specifically contracted for additional days to accommodate end user training. An agenda of topics that will be decentralized will be developed by the Clarke County, VA PM and Tyler PM prior to the session. The Clarke County, VA is responsible for providing documentation for these sessions.

Prerequisites for the Education sessions are:

- Users must have basic computer skills, including but not limited to: using a mouse, clicking on an icon to open a new window, minimizing and switching between windows, printing screens, and using the desktop.
- All users must have user logins to the Tyler Training database, or other database (if determined by Tyler and Project staff) and know how to access the environment.

- All users must have access in both the training lab and their personal workspace to the Tyler Training database, or other database (if determined by Tyler and Project staff) and know how to access the environment.
- Users who will be assigned tasks to be completed in the Tyler Live database must have appropriate access to the Tyler Live database and know how to access the environment.

Reconciliation and Reporting Training
Reconciliation and Reporting training is provided 30 to 60 days after go live. Many of these programs are covered during application training but it is Tyler's practice to review these processes again once live, real-time data is available in the system. The timing also ensures the training is occurring around the time a client would first need to close a period in the live database.

Other Tyler Education Resources

KnowledgeBase
The Munis KnowledgeBase is a searchable database of Munis product information. The KnowledgeBase contains procedural documents, file layouts, release notes, user conference documents, videos, and other information related to the use of Munis products. Information on the KB can help to complement user training, as well as be used as a baseline for clients to create their own custom documentation. Users must register on the Tyler Tech site in order to access the KnowledgeBase.

http://www.tylertech.com/client-support/munis-support

Logistics
Tyler and the Clarke County, VA will work together to define education logistics. The following table should be used as a starting point for defining logistics. The final logistics table will become part of the Education Plan.

Software/Hardware	
How many databases will be utilized?	
Will we establish a Financials Training environment separate from Payroll and/or Revenue?	
Who will refresh the Training databases?	
Will a second server be utilized?	
Availability	
What are your standard working hours?	
What will the standard training hours be?	
Are there days during the standard week that work better than others?	
Are there any conferences, internal training sessions, auditor visits, and so on that we need to schedule around?	
What is the standard weekly work schedule? Does any staff have Fridays off?	
Staff	
How many students per teacher?	
How many students per workstation?	
Who will conduct attendance?	
Will management be present for each session?	
Who will train the end users?	
Who will have access to the KB?	
Who will have access to SharePoint?	
Schedule	
Who will notify staff members of appropriate training sessions?	
How far in advance will the training schedule be built?	

Facilities	
Will there be more than 1 training room? (room detail should be notated in the Facility Matrix in the Resource Plan)	
Is there internet access available in the training room for Tyler staff?	

Action Plan

The final logistics table will be placed into the following table format which will become the Action Plan

Logistic Item	Owner	Date Needed	Date Completed
List of users to attend Functional Leader sessions by module	Client PM		
List of users to be trained in Core User sessions by module	Client PM		
List of users to be trained in End User sessions by module	Client PM		

Measurement & Tracking

Clarke County, VA may develop a training survey which users will complete at the conclusion of each session. Surveys could be reviewed by the Clarke County, VA PM and the Clarke County, VA Functional Leader. The intent of the survey is to validate knowledge transfer and alert management to the need for additional training or new approaches desired by staff, which can be discussed with the Tyler PM as needed. Sample survey questions follow:

- Did you review the prerequisite materials prior to training?
- Did you review the How To documentation?
- Did you understand the training scripts?
- What would you change about the class?

Implementation Management Plan Acceptance

Date:
Client:
Client Project Manager:
Tyler Project Manager:
Project Phase:

This memo indicates client acceptance that the Implementation Management Plan has been delivered by the Tyler Project Manager and reviewed by the Client Project Team. Per the contract, Tyler shall invoice the Project Planning Services upon delivery of the Implementation Management Plan.
The following plans are included in the Implementation Management Plan:

- Scope Management Plan
- Communication Management Plan
- Quality/Testing Management Plan
- Risk Management Plan
- Schedule Management Plan
- Resource Management Plan

Please acknowledge receipt and acceptance of the Implementation Management Plan by signing and dating the bottom of this page.
Please return this sign off to <<Tyler PM>>. If we do not receive it within 5 business days, we will consider the sign off complete and the Implementation Management Plan accepted.

Client Project Manager: ______________________________ Date: ________________

A. Tyler Change Management Process

Change Management Preparation

1. Establish the Project Sponsor(s), Steering Committee, Project Manager, and Project Team
2. Identify a Change Management Functional Lead(s) as part of Project Team
3. Identify and Document Strategic Goals, Objectives and Project Vision for ERP Project
    - Goals
        - Identify objectives – in order to best recommend areas of improvement, knowing the mission and vision of the organization is imperative.
        - Identify Process Improvement goals that will best align business processes to the objectives and priorities. Optimizing business processes, reducing costs, improving operational efficiencies, and providing quality services should be inherent goals and the cornerstone of the project vision.
    - Participants
        - Project Sponsor(s), Steering Committee, Project Team, Change Management Functional Lead(s)
    - Activities
        - Review Project Mission/Vision Statements and review Strategic Operating Plan. Determine the strategic goals/objectives of the project and the project vision that will be supported by change management strategy. Document project mission, goals, vision, expectations, etc. to be included in project communications.

4. Identify and Document available Communication Modes
    - Goal
        - Identify the available communication modes that will use change management strategy to prepare and promote ERP Project success in achieving the organizational goals, objectives and project vision.
    - Participants
        - Project Manager, Change Management Functional Lead(s)
    - Activities
        - Review available communication modes
        - Do we need permission to use communication modes?
        - Is there an employee intranet available?
        - Document access/ownership of communication modes
        - Document specific timing of existing communications (newsletters, project updates, etc.) existing scheduled meetings (project team meetings, steering committee meetings, departmental meetings, principal and/or campus meetings, if applicable)
        - Executive mandate letter to introduce project to the organization
        - Executive communication quarterly
5. Brainstorm to develop ideas for the ERP Project BRAND
    - Goal
        - A project BRAND is a "friendly" name and/or "logo" that will represent the ERP Project. The project will be referred to as the BRAND and the BRAND will be used in all communications. Branding creates a familiar name and icon/logo that will build project recognition and acceptance.

    - Participants
        - Project Manager, Project Team, Change Management Functional Lead(s)
    - Activities
        - Use the objectives, goals, mission statement and project vision to create a familiar name and an icon/logo that reflect these project elements

- Encourage Staff participation – create a few names/icons/logs and let Staff vote for the winning name and logo/icon (Build buy-in)
- Get permission from Sponsor(s), Steering Committee on winning name logo
- PDF the winning design and name so that the image can be used in project posters, project resource intranet page and all other communication vehicles

Discovery/Preparing for Change

Objective: This phase of the change management process commences once a contract has been signed. Discover/preparing for change includes activities to understand the scope of the change, the organizational readiness and culture for change. The results of these activities will be used to prepare the project manager, change management functional lead(s) and project team for change management, to enable the sponsors to support the change and to help the project manager, change management functional lead(s) and project team architect a high-level Change Management strategy.

Discovery Activities

Objective: Understand the characteristics of the change and the organization, and the capacity for change within the organization. This understanding will help the project manager, change management functional lead(s) and project team to establish the change management strategies to support the implementation process.
Resources: Project Manager, Project Team, Change Management Functional Lead(s)
Outputs:

- Scope Analysis

  Objective: To define the scope of the change and the impact on organization departments. Specifically, this describes the scope of the project change.
  Resources: Project Manager, Change Management Functional Lead(s), Project team
  Outputs:
  - What is the project change?
  - Who does the project change impact? Is it a change impacting only one department or the entire organization? How many employees will be impacted?
  - When will staff be impacted? Will some staff be impacted at different times; in differing ways?
  - What is the time frame for the project?
  - Is there a defined "go-live" date?
  - Will there be a change to job roles?
  - Do you anticipate process/procedure change?
  - Do you anticipate a reduction in staff due to the change?

- Organizational Assessment

  Objective: To define the organizational culture and readiness for change. Specifically, this describes the culture of the organization.
  Resources: Organization Project Manager, Change Management Functional Lead(s), Project Team
  Outputs:
  - What is the perceived need for change among management? Among employees?
  - What is the history of past changes, success or failures?
  - Are there other change initiatives happening within the organization at the same time? How many? What are they?
  - Do managers and employees have a shared vision of the organization in relation to this project change?
  - Are there resources and funding available to support this project change?
  - Is the organization responsive to change initiatives; or is the culture closed and resistant to new ideas and change?
  - What is the leadership and power distribution of the organization?
  - Will managers and employees believe that the organization will sustain the project change? Have other project changes not been sustained?
  - Are "middle – managers/supervisors" predisposed to resist change projects? What has the history of project change support been with managers/supervisors?

Answers to these questions will assist the project manager, change management functional lead(s) and project team to develop communication strategies that will address the areas of project scope and organizational culture as well as highlight any organizational negative history.

Project Kick-Off

Objective: This is the transition from Sales to Implementation. Project teams are introduced, an overview of the project process is reviewed, and expectations are discussed.
Resources: All interested parties.
Outputs: Acknowledgement and recognition of the new project change, the project brand and the commitment of the organization to support and sustain the project change.

Impact Index Evaluation

Objective: To understand the project impact on individual departments/divisions of the organization.
Resources: Organization Project Manager and a representative (manager/supervisor) from each department/division that will be functionally impacted by the project change. For example; if implementing the MUNIS Financial Module impacted departments/divisions would be: Accounting, Budgeting, Purchasing, Accounts Payable, Fixed Assets, Etc., Change Management Facilitator
Outputs:

- How many impacted staff in the department?
- What percentage of impact on the daily work of this group?
- What percentage of impact on the process/ procedure of this group?
- What percentage of impact to the tools of this group?
- Does staff perceive the need for this project change? Are they dissatisfied with the current state? Do they view the change as necessary?
- What is the impact of past changes on staff? Where they positive or negative?
- Are there additional changes underway in your department? What are they?
- Does your staff share a unified vision and direction for the organization concerning this project change?
- What is the culture of the communication within your department? Is there a preferred mode of communication with your staff?
- Is staff open and receptive to new ideas and project changes?
- Do you reward staff for adapting to change?
- Do you anticipate any unique challenges with your department? Please explain.

Discovery Analysis

Objective: Compile assessment results and prepare change management analysis to drive change management strategy for project implementation success.

- Prepare Analysis
  Objective: Prepare follow up and analysis of assessments. What does the information tell you about the change and the impact on the organization? What departmental impact and culture has been discovered? How will you use this information? How will the information drive communication strategy; meeting strategy; training strategy; sponsorship involvement; and reinforcement planning?

  Resources: Organization Project Manager, Change Management Functional Lead(s), Project Team

  Outputs: Presentation of analysis results and strategy recommendations to Sponsors/Steering Committee by Organization Project Manager, Change Management Functional Lead(s), Project Team.

Supporting the Change Process – Managing Change

Objective: This phase of the change management process commences once Discovery and Analysis are complete. Change management strategies/plans will be designed based on Discovery and deployed throughout the organization. Execution of change management strategies and plans is the responsibility of the Organization Project Manager, Change Management Functional Lead(s), Project Team

Change Management Strategies/Plans

Objective: Change Management Strategies/Plans will be designed and implemented throughout the organization; these plans will be specific to the organization based on the analysis results of Discovery/Preparing for Change.

Communication Strategies

Objective: Understand the concepts of change management communications and provide communication strategy for inclusion in the over-all project communication plan
Resources: Organization Project Manager, Change Management Functional Lead(s), Change Management Facilitator
Outputs: High level Change Management Communication strategies that will assimilate with the project communication plan

- Advertise the project "brand" to cultivate understanding and commitment to the project
- Create an executive mandate announcing the project and the project expectations right before the project kick-off; this communication will set the commitment to the project change
- Prepare staff by beginning the communication strategy early in the project
- Communication must be repeated to be successful – deliver a clear message
- Create a project resource section on the staff intranet to house all project communication, documents, calendar or events
- Have a feedback mechanism in place; respond to all feedback
- Engage managers and supervisors to be communicators of the project change (Coach Strategy)
- Share what the change will mean to the employee:
  - How will the change impact individual staff?
  - What will staff do differently after the project change?
  - What's in it for me (staff)?
  - What are the business reasons for the change?
  - What is the impact on the organization?
- Use effective communication modes:
  - Face to face is the most powerful communication method
  - Group meetings and presentations
  - One on one sessions
  - Posters
  - Bulletin boards
  - Videos
  - Flyers

Coaching Plan

Objective: Train and build a core group of organization employees to understand change management concepts and to develop change management leaders in project support strategies.
Resources: Project Manager, Project Team, Change Management Functional Lead(s), Managers and Supervisors of impacted employees
Outputs: Coach Training Sessions

- Train managers and supervisors of impacted staff
    - Understand "why" change can be difficult for some staff
    - Understand the project change and the impact on their staff
    - Understand process and/or procedure change
    - Understand the importance of consistent and repetitive communication to prepare staff for the project change
    - Prepare with project information, FAQ's, demonstrations, project timeline and calendar of events
    - Prepare managers and supervisors to recognize and address resistant behavior

Sponsorship Plan

Objective: Roadmap of project events where Sponsors can be visible and active. The number one indicator of project success is active and visible project sponsorship
Resources: Organization Project Manager, Change Management Functional Lead(s), Executive Sponsor (s)
Outputs: Sponsor Plan – events, dates and times for Executive Sponsor to participate in project activities

- Direct communication with staff
- Share the vision of the project change
- Build a coalition with managers and supervisors to ensure their commitment to the project change
- Stay active and visible throughout the project implementation

Resistance Management Plan

Objective: Diagnosing gaps and managing resistance is an ongoing process in a change management strategy plan
Resources: Organization Project Manager, Change Management Functional Lead(s), Executive Sponsor (s), Key Stakeholders and front line managers/supervisors.
Outputs: Resistance Management Plan – guidelines to help diagnose the root cause of gaps and/or resistance and appropriate steps to address problem areas.

- What might resistance look like in the organization?
    - Direct or indirect challenges
    - Lack of acknowledgement
    - Open hostility towards project information
    - Feigned ignorance
    - Confusion
    - Absenteeism
    - Nonattendance at project sessions
    - Noncompliance with business process

- Where are likely areas for resistance to occur?
    - BPI Sessions
    - SET (Static Environment Test) Sessions
    - End-user Training Sessions
    - Project Feedback from Project Website
    - Supervisor input
    - Compliance audits

- What are some causes of resistance?
    - Lack of understanding?
    - Misinformation?
    - Resistant manager/supervisor in department?
    - Does a process or procedure decision not work?
    - Is it a software issue?

- Define the process flow for resistance management once a resistant issue has been raised to project management
  - What is the path for resistance management by staff level or issue type?

Business Process Transition Plan and Worksheet

Objective: A Business Practice Transition Plan/Worksheet is a detailed plan to address changes in job roles, responsibilities, procedures/process and/or organization structure.
Resources: Organization Project Manager, Change Management Functional Lead(s), Executive Sponsor (s), Key Stakeholders, Human Resources and front line managers/supervisors.

- Outputs: Business Process Transition Worksheet – Record where the project team identifies the impacted positions and the business/HR leaders use the record information to meet and discuss direct impacts to individuals.
  - What is the "delta" between the current and future state (process/procedure change)
  - Create a key role map – a diagram of each impacted department with a pyramid of impacted job roles and the staff associated with these roles
  - Use the key role map to understand and map the transition impact of each job role
  - Use the key role map as a communication tool to prepare each of the impacted staff for the specific impact to their job role

Execute Change Management Strategies and Plans

Objective: Delivery of change management plans/strategies:

- Communication strategies to be incorporated into the project communication plan
- Sponsor Plan
- Resistance management strategy
- Coach training sessions

Resources: Organization Project Manager, Change Management Functional Lead(s), Change Management Facilitator
Outputs: Supporting the Change Process - Plans and Strategies – the organization is responsible for managing and executing the change management plans
Objective: To ensure that all change management plans are consistently executed and implemented

Reinforce to Sustain the Change

Objective: This phase of the change management process is ongoing throughout a project transition although presented here sequentially. Reinforcement of the project change actually begins at project kick-off; reviewing feedback, auditing and implementing corrective actions as necessary will be part of the project from beginning to end.

Monitoring and Controlling

Objective: Taking action to ensure compliance with project expectations.

Monitor Project Compliance

Objective: To understand if there are gaps or resistance to the project change or process
Resources: Organization Project Manager, Project Team, Change Management Functional Lead(s)
Outputs:
Collect and analyze feedback- Suggested tools to use:

- Training feedback surveys
- Competency tests
- Review FAQ's or project feedback specific to your department
- Periodic process review

Diagnose gaps:

- Review feedback survey's for trends, comments or issues that may affect your department
- Review competency tests for low scoring areas or for trends on comments. Additional training may be required. Be an advocate.
- Provide feedback from the FAQ's. This will reinforce the fact that project questions and concerns are being addressed
- During periodic process review, are people reverting back to old habits- Example: Is the clerk using the old spreadsheet rather than the new system tools? Ask staff to walk you through a newly implemented process using the new tools.

Execute Corrective Action Plans

Objective: To correct gaps in process or issues with application
Resources: Organization Project Manager, Project Team, Change Management Functional Lead(s)
Outputs: Implement corrective actions:

- Root Cause Analysis: If gaps in the process are discovered, perform root cause analysis to discover why there are gaps
- Training: Are there additional training requirements?
- Technical: Are there technical issues preventing the process from being completed?
- Process Redesign: Does the planned process have gaps that were not identified in the original design?

Knowledge Transfer/Execution

Objective: Support go-live events

After Action Review

Objective: What worked? What did not work? What will we do differently next phase?
Resources: Organization Project Manager, Project Team, Change Management Functional Lead
Outputs: Lessons Learned will provide guidance for the next phase or next project

Phase Closure

Objective: Transition from Implementation to Support and Customer Care. Introductions are made; Support and Customer Care are made aware of any outstanding issues or concerns.

B. Risk Management Planning Doc

A Risk Management Plan involves defining methods and procedures for assessing and dealing with possible threats that could arise inside or outside the organization. Although the exact nature of potential issues or their resulting consequences are sometimes difficult to determine, it is beneficial to perform a comprehensive risk assessment of all threats that can realistically occur to impact the organization.

The Risk planning process should identify and measure the likelihood of all potential risks and the impact on the organization if that threat occurred. To do this, each department should be analyzed separately since there may be variances in levels of automation, recovery processes, and so on. The ultimate goal of the Risk Management Plan is to protect the organization, its employees and infrastructure from liabilities. In this instance, the Risk Management planning focuses on risks that may impact the Tyler Implementation project.

Risk Register

The project's risk register will be created and maintained during the risk management process and will become part of the Implementation Management Plan. All identified risks should be entered in the register. The risk register is located on the project SharePoint site and may include the following points.

Entered in the risk register during or after Risk Identification:

- Risk ID – A unique identifier for the risk. To be used when referring to risks in meetings and communications.
- Risk Description – A description of the risk.
- Impact on Project if Risk Occurs – If the risk occurs, will it impact scope, schedule, cost, user satisfaction, etc.?
- Possible Triggers – Listing of the triggers of the risk.
- Date Identified – The date the risk was identified.
- Status – Identifies whether the risk is a priority, on the watch list, or closed (see risk response section below).
- Category – The category for the risk (i.e. personnel, training, conversion, etc.).

Entered in the risk register during or after Risk Analysis:

- Probability – The likelihood that the risk will occur. See the "Risk Analysis" section of the below for possible values.
- Impact – The effect on project objects if the risk event occurs. See the "Risk Analysis" section below for possible values.
- Risk Score – Reflects the severity of the risks effect on objectives. The risk score is determined by multiplying the risk probability and risk impact values. The intent is to assign a relative value to the impact on project objectives if the risk in question should occur.

Entered in the risk register during or after Risk Response Planning:

- Risk Owner – Person(s) responsible for the risk if it should occur.

- Response Strategy – The strategy that is most likely to be effective.
- Risk Response Plan – Specific actions to enhance opportunities and reduce threats to the project's objectives based on the most likely strategy.

Risk Identification

The following techniques may be used to develop a comprehensive list of risks for the project. A minimum of one technique must be used. However, it is recommended that two, or more for larger projects, should be used to ensure that as many risks and opportunities have been identified for the project as possible. (i.e. brainstorming and expert interview or affinity diagram)

In addition to identifying the risks, the causes and effects of the risk should be identified and recorded in the risk register. The causes may lead to the identification of additional risks. Finding and eliminating the root cause may eliminate several project risks. For example, if the risk is that training may have to be repeated, the causes may be that users don't attend, users aren't aware of the schedule, users had other tasks that were higher priority, users were on vacation, etc. The effect of this risk is that the project costs may overrun by repeating training sessions, or the schedule may be increased because of having to reschedule training and rework the Project Plan.

Described below are five techniques for risk identification. Choose a minimum of one technique to use for this project. Enter your choices in the Risk Identification Procedures table in the Implementation Management Plan.

Option 1: Brainstorming - SWOT Analysis
A SWOT Analysis is a strategic planning tool used to evaluate the Strengths, Weaknesses, Opportunities, and Threats involved in a project or in a business venture. Strengths and weaknesses are internal to an organization. Opportunities and threats originate from outside the organization.

A SWOT analysis, usually performed early in the project development process, helps organizations evaluate the environmental factors and internal situations facing a project. Strengths and weaknesses are attributes that measure your internal capability.

Opportunities and threats refer to how the external environment affects your team/business/group. Ideally a cross-functional team or a task force that represents a broad range of perspectives should carry out SWOT analyses.

SWOT Analysis Template

Project Name:
Prepared by: Date: Project Manager: SWOT Analysis Facilitator: SWOT Analysis Participants:

SWOT Analysis Recorder:

Date of SWOT Analysis:

Project Strengths: (What potential strengths exist about the project, the project team, the sponsor, the organization structure, the client, the project schedule, the project budget, the product of the project, and so on?)
1.
2.
3.
4.

Project Weaknesses: (What potential weaknesses exist about the project, the project team, the sponsor, the organization structure, the client, the project schedule, the project budget, the product of the project, and so on?)
1.
2.
3.
4.

Project Opportunities: (What potential opportunities exist in regard to achieving the project requirements, the product requirements, the project schedule, the project resources, the project quality, and so on?)
1.
2.
3.
4.

Project Threats: (What potential threats exist in regard to achieving the project requirements, the product requirements, the project schedule, the project resources, the project quality, and so on?)
1.
2.
3.
4.

Option 2: Brainstorming – Prompt List Analysis
This technique uses a list of categories to prompt stakeholders to think of threats and opportunities. It is held in a discussion forum and the facilitator discusses the project, then brings up each category and asks users to identify the risks associated with each category. The risks are written on a board for all attendees to view and discuss, and later transferred to the risk register.

Categories:

- Schedule/timeline
- Cost/budget
- Resources – project team and users

- Resources – training rooms, computers, etc.
- Business process changes
- Training
- Conversions
- Interfaces

Option 3: Expert Interview
Members of the project team sit with identified stakeholders (high power/influence people, subject matter experts, etc.) to discuss the project and identify associated risks. This technique is time consuming, but may be a good option for any remote or less available stakeholders.

Option 4: Delphi Technique
An e-mail or memo is sent to subject matter experts asking them to identify risks associated with the project. The memo should contain project information to allow users to understand the scope of the project in order for them to raise valid concerns or opportunities. Time should be allowed for them to respond with their list of risks. The Risk Manager will compile the results, categorize them and send them back out to the participants for review, to gain consensus, and to identify additional risks. This is usually done anonymously (contributors names are not shown on the risk register or in team communications during this process).

Option 5: Affinity Diagram
This technique is typically used after other techniques such as those listed above. This will allow users to put the identified risks in a diagram based on category. It stimulates teamwork and allows the team to agree on the risks, discuss their causes and triggers more thoroughly and identify risks or opportunities that may have not otherwise been thought of. Using sticky notes or forms, users will place the identified risks under the appropriate risk category on a board or wall.

Risk Analysis

Each identified risk should be assigned a probability score and an impact score and these should be recorded on the risk register. The scores may change over the course of the project, so should be reviewed and updated regularly. For instance, a risk may have a low impact at the start of the project, but may have a high impact as the project progresses.

Likelihood or probability of each risk

5	Very likely to occur
4	Probably will occur
3	May occur
2	Unlikely to occur
1	Very unlikely to occur

Potential impact of each risk on the project

5	Event poses very high cost, schedule, or other failure
4	Event poses major cost, schedule, or other increases

3	Event poses moderate increases, but requirements may still be met
2	Event poses small increases, but requirements may still be met
1	Event has little impact on the project

Probability and Impact Matrix

After determining risk scores for each risk's probability and impact, use the following scale to determine the risk priority. Risks with ratings (Risk rating = probability score x impact score) of 10 or higher should be evaluated and reviewed regularly, and should appear on the status reports. Medium and Low risks should be monitored and scores should be re-evaluated throughout the project, as impact and probability change.

		Impact				
		1	**2**	**3**	**4**	**5**
Probability	5	5	10	15	20	25
	4	4	8			
	3	3	6	9		
	2	2	4	6	8	
	1	1	2	3	4	5

After determining the risk ratings for each identified risk, the Risk Register should be updated to reflect the appropriate status for each risk. At this time, each risk will have a status of either "Watch List" for risk scores less than 10, or "Priority" for risk scores of 10 or higher.

Risk Response Planning

Responses should be planned for all high priority risks (risk score of 10 or greater) to plan for what will need to happen if the risk is triggered. Risks will be assigned risk owners who will be responsible for watching the risks and implementing these responses if the causes that trigger the risks have occurred, or are about to occur. The risk owners should also identify secondary risks that occur as a result of implementing the risk response, or risks that remain after the response has been implemented.

The following strategies will be used for determining the appropriate response for each risk or opportunity and should be recorded for each high priority risk, along with the chosen response for the risk.

- Threats:
  - *Avoid* – Risk avoidance entails changing the Project Plan to eliminate the risk or condition or to protect the project objectives from its impact.
  - *Transfer* – Risk transference is seeking to shift the consequence of a risk to a third party together with ownership of the response. Transferring the risk simply gives another party responsibility for its management; it does not eliminate it.
  - *Mitigate* – Risk mitigation seeks to reduce the probability and/or consequences of an adverse risk event to an acceptable threshold. Taking early action to reduce the probability of a risk's occurring or its impact on the project is more effective than trying to repair the consequences after it occurs.

    - *Accept* – This technique indicates that the project team has decided not to change the Project Plan to deal with a risk or is unable to identify any other suitable response strategy.
- Opportunities:
    - *Exploit* – Exploitation entails taking actions to ensure that the opportunity will occur and that the project will benefit from it.
    - *Share* – Sharing the opportunity is seeking to shift the consequence of a risk to a third party in order to gain benefit for the project. Transferring the risk simply gives another party responsibility for its management; it does not eliminate it.
    - *Enhance* – Enhancing seeks to increase the probability and/or impact of an opportunity. Taking early action to increase the probability of an opportunity occurring or its impact on the project is more effective than taking no proactive action, yet hoping that it might occur.
    - *Accept* – This technique indicates that the project team has decided not to change the Project Plan to deal with an opportunity or is unable to identify any other suitable response strategy.

The Risk Register should be updated upon completion of risk response planning. If the risk plan is to mitigate, the original probability and impact scores should be updated to reflect the current status, as the scores will likely be lower than before risk response planning. Risk Owners should be assigned to all risks at this time.

The Project Plan should be updated to incorporate any activities associated with risk response plans that will be implemented. Risk response activities that will be implemented only if a risk trigger has occurred or is about to occur should not be entered into the Project Plan at this time.

Risk Monitoring and Control

Risks must be continuously reviewed, monitored and controlled throughout the project. Newly identified risks should be added to the risk registers and the steps performed earlier in the process (risk analysis and response planning) should be performed. In addition, identified risks should be monitored and updated, as probability and impact change throughout a project. Risks may also no longer pose a threat or opportunity and may be closed.

Risk Owners should review their assigned risks regularly to determine if a trigger is about to occur, or if it has occurred, so they can implement the risk response plan.

Regular updates to the Risk Register and the Project Plan are necessary throughout this process.

				PHASE 1														PHASE 2			PHASE 3									
NAME	INFORMAL TITLE	ROLE 1	ROLE 2	Accounts	GL	Budget	AP	BMI	Cash	Contract	Fixed Asset	Inventory	Proj & Grant	Purchasing	Student Acty	E-Procure	Reports	Payroll/ESS	HR	Applicant	AR	Gen Billing	Permits	Cashiering	Citizen SS	GIS	Utility Bill	Tax Billing	Income Tax	CAMA
Michael Hobert	Board Chair	Govern																												
Chip Schutte	Board Member	Govern																												
Thomas Judge	JAS Director	Executive	PM	1	1	1	1		1	1	1			1			1	1	1	1	1	1					1	1		
Annette Gilley	JAS Accounting	Functional		1	1	1	1		1	1	1		1				1	1	1	1	1	1						1		
Brenda Bennett	JAS Accounting	Functional		1	1	1	1			1	1		1		1		1	1	1	1	1	1								
Pat Wiley	JAS Purchasing	Functional						1		1	1	1		1		1												1			
Emily Johnson	JAS Accounts Payable						1			1	1	1		1		1	1													
Michael Legge	JAS Purchasing	Functional		1	1	1		1		1	1	1	1	1		1	1				1	1					1			
Sally Sheckels	JAS Payroll	Functional															1	1	1	1								1		
Virginia Wright	Animal Control																						1	1		1	1				
Angie Cather	Building Inspections Admin																							1		1	1				
Jamie Royston	Building Inspector																							1		1	1				
Helen Butts	Clerk of Courts																										1				
April Wilkerson	Clerk of Courts Admin																														
Donna Peake	Commissioner of Revenue	Functional																									1		1	1	1
Sue Braithwaite	Commissioner of Revenue Admin																										1		1	1	1
Page Smoot	Commissioner of Revenue Admin																										1		1	1	1
David Ash	County Administrator	Govern	Executive								1		1	1				1	1	1										
Lora Walburn	County Administrator Admin	Functional														1	1	1	1	1					1					
Gordon Russell	Government IT	Functional	Tech					1			1	1											1			1		1		1
Robert Fuller	Government IT	Tech						1			1	1											1			1		1		1
Clesta Rhodes	Commonwealth Attorney Admin																													
Suzanne Mackall	Commonwealth Attorney																													
Ruby Miller	Maintenance Admin							1		1	1	1		1		1	1													
Robert Levi	Maintenance Director					1					1	1	1																	
Lisa Cooke	Parks Director					1		1										1	1	1										
Tanya Myers	Parks Admin							1	1			1		1		1														
Alison Teetor	Planner Natural Resources													1										1				1				
Debbie Bean	Planning Admin																							1		1	1				
Brandon Stidham	Planning Director	Functional				1							1					1						1		1	1				
Jesse Russell	Planning Zoning Administrator																							1		1	1				
Barbara Bosserman	Registrar											1													1					
Pam Hess	Sheriff Communications									1		1	1												1	1				
Travis Sumption	Sheriff Chief Deputy																													
Tony Roper	Sheriff	Executive				1						1						1	1	1										
Janine Rose	Sheriff Admin	Functional						1			1	1	1	1		1	1	1	1	1										
Angie Jones	Social Services Director																													
Bonnie Peery	Social Services Admin					1										1		1	1	1				1						
Tammy Smith	Social Services Admin																							1						
Sharon Keeler	Treasurer	Functional		1	1		1		1								1				1	1	1	1	1		1	1	1	1
Whitney McDonald	Treasurer Admin								1												1	1		1	1		1	1	1	1
Elizabeth Collins	Treasurer Admin			1	1		1		1								1				1	1	1	1	1		1	1	1	1
Fallon Hudson	Treasurer Admin								1												1	1		1	1		1	1	1	1
VACANT	Pupil Personnel Director												1																	
Jill Sowers	Pupil Personnel Asst																													
Steve Wolford	Pupil Personnel Admin														1															
Chuck Bishop	School Superintendent	Govern	Executive							1	1		1	1				1	1	1										
Rick Catlett	School Assistant Superintendent	Functional				1				1			1	1			1	1	1	1										
VACANT	School Executive Secretary																													
Cathy Seal	School Instruction												1																	
Randy Trenary	School Operations							1	1	1	1	1	1	1				1	1	1	1	1								
Renee Weir	School Office Manager											1	1	1		1					1	1		1						
Madeliene Paige	School Personnel Secretary																	1	1	1										
Jeff Jackson	CCHS Principal														1															
Jay Lucas	CCHS Asst Principal														1															
Dana Waring	CCHS Asst Principal														1															
Barbara Armstrong	CCHS Bookkeeper			1	1	1	1								1	1					1	1		1						
Sherry Herlihy	CCHS Secretary																													
Evan Robb	Middle School Principal														1															
Kip Tuttle	Middle School Asst Principal														1															
Chris Kennicott	Middle School Bookkeeper			1	1	1	1								1	1								1						
Amy Angelo	Boyce Elementary Principal														1															
VACANT	Boyce Elementary Asst Principal														1															
Robin Pickett	Boyce Elementary Bookeeper			1	1	1	1								1	1								1						
Nicole McGowan	Cooley Principal														1															
Darren Young	Cooley Assistant Principal														1															
Donna Luce	Cooley Bookkeeper			1	1	1	1								1	1								1						
Althea Thompson-Prince	Cooley Bookkeeper 2			1	1	1	1								1	1								1						
Ed Shewbridge	School IT	Tech						1		1	1	1		1																
VACANT	School IT Admin							1																						
Sue Harrington	School Transportation							1																		1				
Nina Tyler	School Transportation Admin																													
TRAIN TRAINER TOTAL	(15 MAX)			11	11	15	11	12	8	12	15	15	15	13	15	15	13	14	14	14	11	12	11	12	13	15	7	12	7	9

CLARKE COUNTY, VA

Risk ID	Risk Description	Probability	Impact	Risk Score	Risk Owner	Mitigation Strategy	Date Reported
1	Key Project Team Member become ill or terminates unexpectedly	2	2	4	Functional Lead	Notify the backup for scheduled sessions	7/28/2014
2	Bad Weather - Cancellation of Sessions - Schedule late days in winter (Jan-Mar)	3	2	6	Executive Team	Communication between PM to ensure rescheduling of sessions or compressing training content; Onsite sessions can be done remotely	7/28/2014
3	Scope Creep - Setting expectations outside project scope	2	3	6	JAS Board	Recommend inclusion, denial, or postponement to BOS and SB	7/28/2014
4	Managing regular work tasks and project tasks (Tax time, budget, contracts, audit, etc)	4	4	16	Executive Team	Plan for conflicts well in advance	7/28/2014
5	Conflict over changes to process or data control	3	4	12	JAS Board	Communication Plan, Change Management Process	7/28/2014
6	Attendance and/or Tardiness for training sessions - Employee	3	3	9	Executive Team	Sign-sheets at beginning of each session, Communicate agenda, management followup	7/28/2014
7	Project tasks not completed within timelines	3	3	9	Executive Team	Communication Plan, Project Plan, Evaluate Change Requests due missed deadlines	7/28/2014
8	Government Personnel Policy and agency signoffs complete by March	2	5	10	JAS Board	Plan adoption well in advance; develop plan b	7/28/2014
9	School Pay and Classification not finalized by March	1	5	5	JAS Board	Plan adoption well in advance; develop plan b	7/28/2014
10	Reversion to manual or legacy systems post implementation	3	3	9	Functional Lead	Train regarding advantages of integration to organization as a whole	7/28/2014
11	Timeline slippage causes schedule conflicts	3	3	9	Executive Team	Weigh costs of options and decide on course of action	7/28/2014