eFare Project

Project Management Assessment

Findings

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Evaluation Methodology and Approach

As expert project management practitioners, a team from North Highland was engaged by TriMet to perform a project management assessment of the eFare Program. Over the course of nine weeks, we interviewed over 40 stakeholders involved in the implementation of the eFare system. This representative group included core team members, vendors, functional team leads, agency partners, as well as some impacted Executives. Through these interviews, we evaluated the program in nine areas critical to high-functioning project management practices, including: Governance & Organization Management, Benefits Management, Scope Management, Project Planning & Scheduling, Cost Control & Financial Management, Communications & Reporting, Quality Management, Vendor & Contract Management, and Risks & Issues Management.

Governance & Organization Management

Benefits Management

Scope Management

Project Planning & Scheduling

Cost Control and Financial Management

Communications & Reporting

Quality Management

Vendor and Contract Management

Risks & Issues Management

Ad Hoc   Repeatable   Organized   Managed   Optimized

We evaluated each category based on its process maturity, process deliverables and stakeholder's level of comfort, from "Ad Hoc" to "Optimized".   Definitions of maturity evaluation levels are below:

- Optimized – Done consistently and documented, formal and intentional
- Managed – Done consistently but NOT documented; documented but NOT done consistently
- Organized – Informally done, but in group setting, proactive and intentional effort, thorough involvement
- Repeatable – Reactive but done routinely, intentional
- Ad Hoc – Reactive and rarely done, unsure of the extent to which it is done

Key Observations

It was a pleasure speaking to all of the TriMet employees involved in the eFare program. While some were not specifically covered in the assessment, there were some common themes and conclusions we thought would be of value to share. :

- **Team was engaged, responsive, and transparent**. Every person we talked to was very eager to share feedback on the project. Interviewees were authentic and transparent in their responses. There was no sense that people were holding back true and honest feedback. Many commended TriMet for investing time and resources into pursuing the assessment, feeling it was a proper step to take to help solidify success.
- **Project is well-run with consideration for careful execution.** As a whole, there is a clear methodology being followed by the project team and the artifacts required to move from one phase to the other are very well-defined. The project team was frequently attributed with the success of the project thus far.
- **High-level of confidence in eFare success.** Overwhelmingly, project stakeholders anticipate eFare will be successful. While recognizing their may be some challenges at roll-out, all believed that TriMet will ultimately be able to work through them and deliver value to its customers.
- **Leadership and sponsorship team involvement is commendable.** The executive sponsorship level is well informed and involved with the program. The core team has received great support to make this project successful. The leadership team was seen as a catalyst rather than a roadblock to success.

The following chart is a representation of the project health scorecard. As mentioned above, the chart was populated based on a combination of our quantification of qualitative questions and direct quantitative questions. The shaded area along each axes represents the average of all relevant interviewee responses.
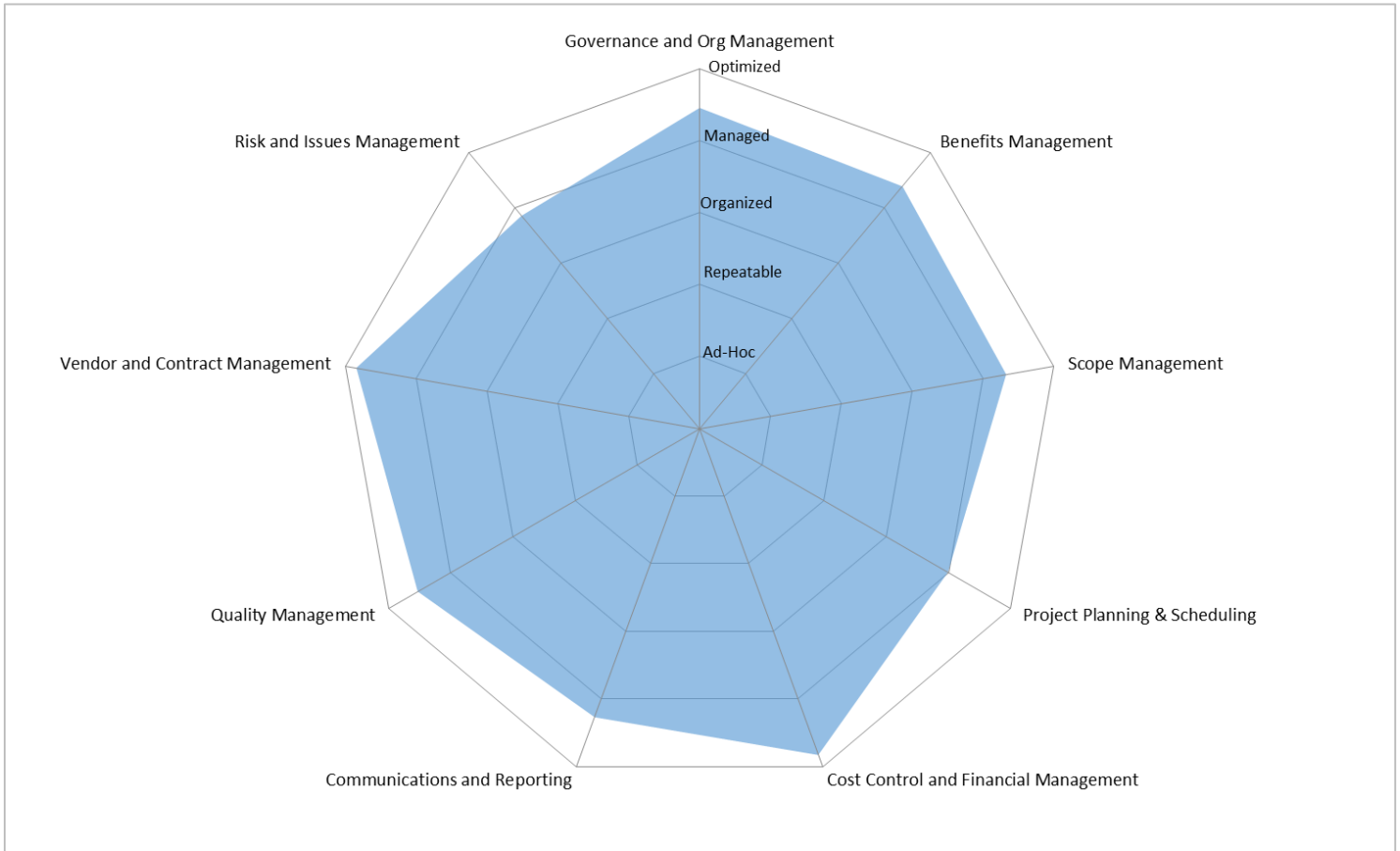
As indicated in the chart, the project is well-balanced across all categories with no major areas of concern. Projects similar in size and scope should fall in the upper band (between "Managed" and "Optimized") to be consider healthy.

The following chart represent the average response (marked with a circle) as well as the low and high point representing the range of responses. The difference between the low and high value indicates how consistent the overall project experience is perceived by the project team.
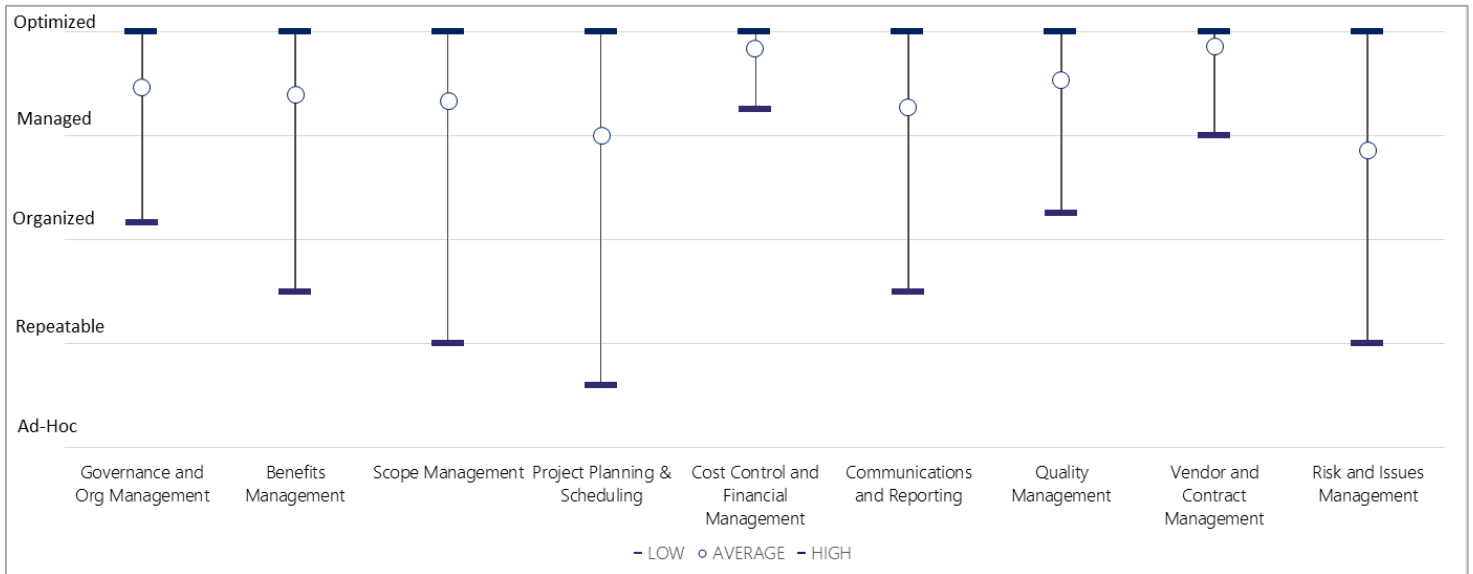
Overall most categories falls consistently between "Managed" and "Optimized" at the exception of the Risk and Issue Management.

The lower boundaries vary by categories. The most common reason for a large range is the lack of understanding of the category processes and/or lack of communications between groups. Those outlier cases usually represent a minority of interviews and can be addressed by better project understanding and meeting participation.

Key Risks and Issues

Risks and issues were identified across all categories of the program detailed in the report below. However, some risks have more impact and could potentially derail the program if not addressed. These top risks include:

- **Project lacks updated comprehensive project management plan with integrated dependencies.** While the integrated project management plan managed by INIT is referenced as the best comprehensive view of all tracks of the project, it was frequently noted that it wasn't updated on a regular cadence and didn't include dependency tracking.

  Staff comments: A comprehensive project management plan existed; however, it was missing the scheduled GlobeSherpa integration, and it was not updated or discussed on a regular cadence. The plan now includes the GlobeSherpa integrated schedule, and is discussed every other Tuesday, which includes integration partners.

- **Missing overall quality assurance plan and lead**. No designated quality lead has been identified. This role on this size of program is typically filled by an experienced lead who is solely responsible for developing a QA plan and managing holistic testing for the program.

  Staff comments: While Toshi Forrest was the de-facto QA lead, with strong support from CH2M and Greg LaRowe from TriMet Fare Revenue, TriMet has now officially assigned Toshi as the QA lead. To date, she has overseen the testing plans and traceability matrix to insure all aspects of the contract are met, and system issues are tested and addressed. Previously, Toshi was a consultant, hired by TriMet, assisting with quality assurance while TriMet installed INIT's CAD/AVL system. She is a Civil Engineer with an ITS focus.

- **Internal project communications overall solid, however, some gaps identified in extended stakeholder group.** The level of communication to the core team, executive team and board members appears to be very effective and efficient. However, communication to the extended team appears less consistent. Stakeholders less involved in planning, but still critically impacted expressed interest in knowing more about the program status, structure, and key decisions.

  Staff comments: Regular communication to TriMet's Board of Directors, Executive Directors, and project team has been effective to date. As we transitioned past Factory Acceptance Testing at the end of 2015, communication to the broader stakeholder group will increase significantly. To address the gap noted with the extended stakeholder group, staff will prepare a monthly dashboard of the project to email to an extended stakeholder list along with the bi-monthly Board Activities update, and will

begin monthly meetings in January 2016 to address project plans, schedules, communication gaps, and to facilitate a robust Q&A discussion.

- **Formal risk/issue management not inclusive of all risk areas.** The core team has done a good job of tracking technical risks and ensure they are revisited often. However, the risks of the program far exceed those around technical delivery such as public engagement, partner agency.

  Staff comments: As noted, a thorough risk assessment was created and maintained frequently, and now includes non-technical risks, such as project communications. As we transition past the Factory Acceptance Testing, the stakeholders involved in adding to the risk matrix will be increased. This will include Public Affairs and additional feedback from partner agencies, to ensure broader risks are captured, such as public engagement.

Key Opportunities

Each category has a set of specific suggestions detailed in the next sections. However, we recommend the following changes for the overall program based on industry best practices.

- **Build out integrated project plan to include all work tracks and associated dependencies.** An effective integrated project plan should include milestones, accomplishments, dependencies and discrete tasks/activities from program start to program completion.
- **Post implementation operational plan**. Before the Beta product release, the project team need to build a post implementation plan to address how the system will be managed post launch.
- **Designate a quality assurance lead.** A role needs to be created to handle testing from beginning to end and define a holistic approach to a quality product.
- **Solidify internal and external communications plan**. eFare will impact nearly all TriMet employees and customers. A well-planned communications plan is critical to a smooth roll-out.
- **Institute regular status reporting.** We recommend a dashboard be created as a high-level "one source of truth" of status for all impacted stakeholders on a weekly or bi-weekly basis. Key timeline changes, decisions, key activities, issues under consideration as well as performance against schedule should be included.
- **Mid-implementation retrospectives**. On multi-year projects, we recommend performing retrospectives after each major milestones to identify and address potential issues.
- **Expanded risk/issue management process.** The risk management process needs to be expanded to include all critical risks, technical or not. Additionally, the risk tracking should be made visible to all potential impacted stakeholders, including vendors.