Information Update – D365 Upgrade: Independent Project Oversight Status Report

To:	Chair and Board of Directors
Through:	President/CEO Inez Evans
From:	Deputy of Governance & Audit Brian Atkinson
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GOVERNANCE & AUDIT D365 UPGRADE: INDEPENDENT PROJECT OVERSIGHT STATUS REPORT

Ongoing Status Update Report (Q4 2021): Microsoft D365 Upgrade

D365 will upgrade and replace the current Microsoft AX system, and provide general ledger, budgeting, procurement, cash management, and other integrated modules and functionality across IndyGo.

The D365 project kick off was on May 17, 2021. The scheduled cut-over date is April 26, 2022. The planned project duration is 11.5 months (excluding any post go-live support).

This update report covers project activity from kick-off through December 31, 2021, or for the first 6.5 months of the project's scheduled duration. This period represents about 57% of the project duration.

We have participated in the implementation vendor's weekly project status calls, reviewed project artifacts, and met with IndyGo project management.

The current D365 project status risk rating is "Low". This aggregate rating is based upon our assessment of the ten Project Management Body of Knowledge (PMBOK) process management areas, as they relate to this D365 upgrade project. PMBOK areas include Integration Management, Scope Management, Time and Schedule Management, Cost Management, Human Resource Management, Communications Management, Quality Management, Risk Management, Procurement Management and Stakeholder Management. Observations and recommendations will be made quarterly as these areas are reviewed.

The D365 project currently does not reflect any delays from the original scheduled completion date, or any projected vendor change orders. However, our following observations and recommendations are designed to help the project remain on schedule and on budget.

RECOMMENDATION:
Receive the report.

Brian Atkinson
Deputy of Governance & Audit