



Date: July 13, 2022  
Current Meeting: July 21, 2022  
Board Meeting: July 28, 2022

**BOARD MEMORANDUM**

**TO:** Indianapolis Public Transportation Corporation (IPTC) Board of Directors  
**THROUGH:** President/CEO Inez P. Evans  
**FROM:** Director of Governance & Audit Brian Atkinson  
**SUBJECT:** Consideration and approval of Microsoft D365 Upgrade – Independent Project Oversight Status Review

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**ACTION ITEM A – 5**

**RECOMMENDATION:**

Review and receive Governance & Audit Report 2022-2  
D365 Upgrade – Independent Project Oversight Status Review

**BACKGROUND:**

The FY 2022 Internal Audit Work Plan approved by the Governance and Audit Committee included a review of IPTC’s D365 Upgrade.

**DISCUSSION:**

The D365 project kickoff was in May 2021. The system go-live occurred as scheduled in May 2022. The project duration was 12 months, excluding certain close out activities and post go-live support.

The Independent Project Oversight will assess whether the D365 technology project is on track to be completed within the estimated schedule and cost and provide the required functionality for the business owner.

The IPO review procedures focused on critical scope areas relating to the D365 project’s progress and project management practices, including:

- Assessment of the project controls in place.
- Comparison to project management best practices.
- Monitoring of project schedule, budget, scope, and overall delivery.
- Evaluation of project risk management, including the identification, monitoring, and resolution of project risks.
- Identification of opportunities to enhance project management performance.

The D365 project did not experience any significant delays from the original scheduled dates. There are certain tasks, including project closeout, that remain open. The observations and recommendations on the following pages are designed to help wrap up the project

**ALTERNATIVES:**

N/A

**FISCAL IMPACT:**

No Fiscal Impact

**DBE/XBE DECLARATION:**

N/A

**STANDING COMMITTEE DISCUSSION/RECOMMENDATION:**

This action will be reviewed by the Governance & Audit Committee on July 21, 2022.