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| **D:\SASD RegionalSan\Joint Logo.png** | **Project Status Report**  **SASD Maximo Upgrade & Support**  As of **05/13/2021** | **Project Manager:** Rudy Aguillio  **Project Sponsor:** Jeff Vail  **Business Owner:** Luisa Gomez |

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| **Initiative Number: 166** | | **ETSC Priority:** N/A | | | **Project Scheduled Completion Date:** TBD | | | | | | **Project Lifecycle:**  Initiation | |
| **Project Description:** Information Technology (IT) is overseeing a routine Maximo upgrade for both the Sacramento Regional County Sanitation District (Regional San) and the Sacramento Area Sewer District (SASD).  Initiative-166 is specific to the SASD Maximo upgrade from 7.6.0 to 7.6.1.2 (or the latest patch version at the time of development).  The IBM Maximo Asset Management framework has been in use by both the Sacramento Regional County District (Regional San) and the Sacramento Area Sewer District (SASD) as a web-based Computerized Maintenance Management System (CMMS) to perform enterprise asset management for several years.  Both districts upgraded to the current Maximo 7.6.0 in 2018 (SASD in April and Regional San in July).  IBM has formally announced that support for Maximo 7.6.0 will end in September 2021.  Extended support is possible at a cost, and may need to be applied for and then approved by IBM.  In addition, the IT Patch Standards call for IT to upgrade Maximo every 18-24 months. | | | | | | | | | | | | |
| **Scope:** | **GREEN = No Issues** | | | **Schedule:** | | | **GREEN = No Issues** | | | **Resources:** | | **Green = No Issues** |
| **Milestones** | | | **Start Date** | | | **End Date** | **Actual**  **End Date** | **% Complete** | **Actions/Comments** | | | |
| Submit final RFP dates to Contracts and request PAO to post RFPs in the Business Opportunity Site | | | 05/03/21 | | | 05/13/21 | 05/13/21 | 100% | 05/13:  Contracts packaged the RFPs  Luisa and Rudy submitted the RFPs to PAO, requesting to post them to the Business Opportunities sites.  05/12:  Project team agreed on the following dates:  The Revised Key Dates are as follow:   * Release of RFP = 05/13/21 * Questions Deadline = 05/20/21 * Posting of Addenda and Response to Question = 06/03/21 * Proposal Submittal Deadline = 06/10/21 * Consultant Interviews = 06/24/21   Notice of Intent to Award = 07/01/21  05/07:  Contracts did not have the packages ready for a 05/03 issuance date, so we will need to reset the key action dates back. Each should be moved back one week.  Dates for the RFP release need to be in sync with the other Maximo RFPs. We will confirm with SASD regarding the key dates on Tues 05/11 at the earliest (so all 3 RFPs will be released at the same time per Contracts instructions)  The Revised Key Dates are as follow:   * Release of RFP = 05/12/21 * Questions Deadline = 05/19/21 * Posting of Addenda and Response to Question = 06/02/21 * Proposal Submittal Deadline = 06/09/21 * Consultant Interviews = 06/23/21   Notice of Intent to Award = 06/30/21 | | | |
| Project Charter: Draft submission to SASD for review | | | 03/24/21 | | | 05/17/21 | TBD | 85% | 05/10: Revised Project Charter to be submitted to SASD by 05/17. | | | |

| **IT Task #** | **Completed Activities This Reporting Period** | **Planned Activities for Next Reporting Period** |
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| TBD | Began Project Plan Drafting   * Although separate projects, we are noting shared tasks in both project plans for SASD and RS Maximo Upgrades | Set up Project Plan Overview Meeting(s)   * Include Confluence Walk-Thru * Include Jira and Big Picture framework Walk-Thru |
| TBD | Submitted request to IBM for a revised quote on extended support (for both districts)   * Initial responses may leave open potential discounts based upon incentives relating to licensing | Work in conjunction with Licensing activities (see next task)   * Currently IBM is looking to quote for 3 month blocks with payment due at a determined time prior to the start of the extended support. * Our licensing options below may include some type of packaging that may have some cost benefits if we migrate to the new licensing model within a specific period of time |
| TBD | * Updated a list of potential vendors in Confluence * <https://confluence.sacsewer.com/display/INIT166/Vendor+Search> | * Send out Correspondence to identified candidates on RFP Issue Date (currently 05/13) |
| TBD | Identified Licensing Options for 2021 | * IT will meet will work with IBM to clarify licensing options and incentives based on decisions to migrate to the new model. |
| TBD | * Submitted request to IBM for a revised quote for extended support (for both district instances) | * Monitor for response; Response will be added as a variable to Planning and the Project Plan |
| TBD | * Held first SASD Maximo Upgrade Project Overview (Monthly) meeting on 4/21/21 | * May meeting is on 05/19/21 |
|  |  | * Continue Build-Out of Confluence Site for Planning Phase |
|  |  | * Continue Build-Out of Jira Big Picture to coincide with Planning Epics/Tasks/Sub-Tasks |
|  |  | * Create Jira Tasks for Work In Progress (WIP) |

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| **Key Risks** | **Probability** | **Impact** | **Status** |
| TRM ability to understand complex processes to meet our upgrade requirements | Low | TBD | 04/16: Less of an issue after the latest conversation with TRM. However, we will continue to monitor as the vendor reviews our requirements.  04/02: Recently discovered. IT will await TRM’s response to our latest email.  A back up plan may involve utilizing Mark W. to help with RM scripting if TRM is unable to meet requirements. |
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| **Key Issues** | **Impact** | **Priority** | **Status** |
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