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| D:\SASD RegionalSan\SASD Logo.png | **Project Status Report**  **SASD Maximo Upgrade & Support**  As of **08/09/21** | **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:** 06/30/2022 | | | | | | **Project Lifecycle:**  Planning | |
| **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** | | | |
| Complete Vendor Finalist Interviews | | | 06/24/21 | | | 07/01/21 | 06/30/21 | 100% | RFP Finalists (Interview Dates):   * Starboard (06/29) * TRM (06/29) * Fields Consulting (06/30) * Maven Consulting (06/30) | | | |
| Finalist Selection and Reference Checks | | | 07/01/21 | | | 07/09/21 | 07/07/01 | 100% | Top-Ranked Candidate = Maven Consulting  Don Keene completed reference checks   * 2 replies * Excellent referrals | | | |
| Contract Services Request (CSR) Form Submission to Contracts | | | 07/09/21 | | | 07/16/21 | 07/16/21 | 100% | 7/16: Approved (Matt/Jeff)  7/16: Submitted for signatures (Matt/Jeff) | | | |
| Contract signed by Consultant | | | 07/30/21 | | | 08/03/21 | 08/03/21 | 100% |  | | | |
| Completed compilation of Board Package materials | | | 07/26/21 | | | 08/02/21 | 08/02/21 | 100% | Project Title:  Contract No. 80000143, Approve the Agreement with Maven Asset Management, Inc. to Provide Consulting Services for the SASD Maximo Upgrade & Support Project | | | |
| Complete Board Item Routing | | | 07/30/21 | | | 08/09/21 | 08/08/21 | 100% |  | | | |
| Complete TRM Upgrade Vendor Contracting | | | 07/15/21 | | | 08/31/21 |  | 85% |  | | | |
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| **IT Task #** | **Completed Activities This Reporting Period** | **Planned Activities for Next Reporting Period** |
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| TBD | Move Maximo Licensing and Maximo Extended Support Components Out of Project Scope | * Next Project Plan Meetings to be scheduled through 09/03/21 |
|  | Completed Consultant Reference Checks | * Continue Build-Out of Confluence Site for Planning Phase |
|  | Completed CSR Process | * Continue Build-Out of Jira Big Picture to coincide with Planning Epics/Tasks/Sub-Tasks |
|  | Finalized Board Package Documents for submission | * Create Jira Tasks for Work In Progress (WIP) |
|  | Board Item Routed for review | * Prepare for Project Plan Meeting on 08/13 |
|  | We created a Final Draft of Configuration Items potentially impacted by the upgrade. | * Continue analysis and subsequent tasks for Related Systems in the scope of the project. |
|  |  | * The next SASD Maximo Upgrade Project Overview Meeting (Monthly) will be on 08/19 |

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| **Key Risks** | **Probability** | **Impact** | **Status** |
| SASD Current Blade Server for Maximo: Extended Support ends in October 2021. (in conjunction with obtaining requirements from the Maximo Upgrade Vendor) | High | High | **07/15: Closed** – IT Ops has found a vendor to provide extended support of the SASD blade server. TPS was submitted on 07/15/21.  07/09: We need to create a mitigation plan. Research Infrastructure needs and acquisition timelines once requirements can be gathered. |
| Contracts found, per the CA Secretary of State website, that the consultant shows SOS/FTB Suspended | Medium | High | **07/27: Closed** – Contracts have completed their review and proceeded to continue with the contracting process.  07/26: Provided Contracts with responses from Maven. Maven’s fictitious name is identical to the business entity noted in Contracts research  07/21: Reported by Katherine Manne; Rudy submitted inquiries to Maven |
| Maven’s insurance coverage value for Professional and Cyber Liability is $1,000,000 per claim and aggregate.  SASD’s has a minimum required value for each coverage type is $2,000,000 per claim and aggregate. | Low | High | **08/10: Closed** – Contracts notes the issue has been resolved  08/08: Maven notes that their insurer has updated their policies  07/28: Maven would like the increase to be in line with their renewal date (08/19); Contracts notes, per Risk Management approval, that the renewal date is acceptable.  07/27: Maven advised of the issue. |
| MaxTAF Testing Tool: We need to clarify access to the SASD Network. | Low | High | 07/30: Issue identified by Michelle. Added a task to determine if an alternate solution will be required (i.e., On-prem); Also need to determine when we can engage the vendor to work on this item. |

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| **Key Issues** | **Impact** | **Priority** | **Status** |
| The following CSR submission acceptance date is 8/04/21, which is for a 9/22 Board meeting to approve the SASD Maximo Upgrade Vendor CSR. | High | High | **07/27: Closed** – Prabhakar approved the inclusion of this board item to the 08/25/21 BOS Meeting.  07/19: Emailed Katherine to see if there is any possibility to get into one of the three board meetings that will occur before 9/22. |
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