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Management Consulting
for
State and Local
Governments

Quality Assurance

Executive Advisement

Project Oversight

Project Management

***Independent Verification
and Validation (IV&V)***

Risk Reduction

Quality Assurance Report

for the

Columbia River Gorge Commission (CRGC)

Access Database Replacement (ADR) Project

January 2025

Prepared by
Bluecrane, Inc.



bluecrane ®



Corporate Headquarters
655 Deep Valley Drive, Suite 300
Rolling Hills Estates, CA 90274
www.bluecranesolutions.com
310-793-0000

January 31, 2025

Ms. Krystyna Wolniakowski
Executive Director
Columbia River Gorge Commission
P.O. Box 730
White Salmon, WA 98672

Dear Ms. Wolniakowski:

bluecrane is pleased to present our January 2025 Quality Assurance (QA) Monthly Report for the Columbia River Gorge Commission's (CRGC) Access Database Replacement (ADR) Project. This monthly report is provided to you in compliance with the State of Washington's QA policies.

Please contact me with any questions or comments.

Sincerely,

Allen Mills



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1. Executive Summary

1.1 Assessment Summary

This report provides the quality assurance (QA) assessment by Bluecrane, Inc. ("*bluecrane*") for the Columbia River Gorge Commission's (CRGC) Access Database Replacement (ADR) Project for January 2025.

With only three weeks remaining before the new system becomes operational, the Project's focus has been almost entirely on preparing for its February go-live. Our January assessment found that:

- Beginning this month, the Project has entered its Gate 8 phase which consists of the final tasks for go-live. The go-live is scheduled to occur between February 19 and February 23. At the time of our assessment, all Gate 8 activities were on schedule.
- The scope for go-live has been set.
- The Project has been testing the software with the converted data. At the time of our assessment, there were no reported data conversion-related defects.
- The Project has submitted the required security design documentation to WaTech and is now awaiting final approval, which is expected to occur by the end of this month.

In addition, the Project is continuing to test the software configuration and is expected to complete end-to-end testing by the end of this month. At the time of our assessment, there were 20 reported defects and 65 percent of those were considered medium to high priority. To date, Tyler Technologies has been prompt in addressing defects. However, if Tyler Technologies is unable to address all of those defects before the first week of February, we encourage the Project to have Tyler focus on resolving those defects that are "go-live critical" – meaning defects that would prevent CRGC from meeting its statutory and regulatory duties and for which there are no workarounds.

Overall, our January assessment found that the Project is exercising good project management practices and that it has the characteristics of a well-managed, healthy, and highly-supported project.

1.2 Change Management Assessment

Starting in November and continuing this month, our change management assessments have focused on how well-prepared CRGC is for its upcoming system transition. To that end, in January, we continued conducting extensive interviews with CRGC staff to assess their readiness for the new system. Our January interviews focused on understanding staff concerns regarding the transition to the new system and the upcoming go-live date. Below are the results of our assessment:

- **Staff Readiness:** The overall sentiment about the Project remains positive; however, there is a general apprehension among staff about the system change, particularly regarding the User Acceptance Test (UAT) phase and staff's ability to adapt to the new system. The training sessions that staff recently participated in appear to have alleviated some of the apprehension. Also, staff confidence appears to be increasing as the go-live date approaches. However, we



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note that ongoing management support and good help desk technical support will be necessary to maintain this trend.

- **Testing:** While testing is underway, staff desire more involvement in defining test cases that reflect real-world scenarios to ensure the system's readiness for their specific tasks. Last month, Environmental Sciences Associates (ESA), who manages the Project and developed the current test cases, provided a walkthrough of how the testing would be conducted with the developed test cases. We encourage additional staff involvement in the development of UAT scenarios as it should enhance staff engagement and ensure the UAT process is aligned with practical needs.
- **Training Gaps:** In December, using change management assessment techniques, we found low staff training scores. In January, we found some improvements; however, there is a lack of ongoing support mechanisms post-implementation which could hinder system adoption. We recommend that CRGC implement a peer mentoring system to support new system users. Additionally, we suggest maintaining transparent communication about system benefits and integrating staff feedback to reduce resistance.
- **System Adoption:** Before the end of February, CRGC will be using its new system to meet its operational responsibilities. It will be important that management and staff become comfortable with the new ways of doing business. We recommend that over the coming months CRGC consider adopting the following practices:
 - Continue involving staff in designing test cases for UAT to ensure real-world applicability and gather real-time feedback during testing for immediate improvements
 - Implement role-specific training and establish a continuous learning path with post-implementation support to address staff concerns about self-sufficiency with the new system
 - Enhance the peer mentoring system and keep communication channels open for feedback to reduce change resistance
 - Establish a structured feedback mechanism for ongoing system input, ensuring the platform evolves with user needs



1.2 Executive “At-a-Glance” QA Dashboard

Area of Assessment	Risk Level			At-a-Glance Assessment
	January 2025	December 2024	November 2024	
Project Management and Sponsorship				
Schedule	No Risk Identified	No Risk Identified	No Risk Identified	For a project of this size, the project management approach being utilized is more than adequate.
Scope	Complete	Nearing Completion/ No Risk Identified	No Risk Identified	The Project’s scope has been stable for almost a year. Once end-to-end testing is completed in January and the go-live scope is confirmed, we expect to close this risk category in our next assessment.
Budget	No Risk Identified	No Risk Identified	No Risk Identified	The Project’s Investment Plan (IP) is approved, and the Project continues to perform within its original estimated budget.
Project Sponsorship and Governance	No Risk Identified	No Risk Identified	No Risk Identified	The Project’s current governance structure is providing adequate direction and guidance to the Project.
Project Management Processes	No Risk Identified	No Risk Identified	No Risk Identified	The approved Project Management Plan (PMP) is consistent with industry best practices and is in accordance with Project Management Body of Knowledge (PMBOK) standards.



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Area of Assessment	Risk Level			At-a-Glance Assessment
	January 2025	December 2024	November 2024	
Project Management and Sponsorship (Continued)				
Risk and Issue Management	No Risk Identified	No Risk Identified	No Risk Identified	The Project is actively and consistently managing its current risks and issues.
Project Staffing	No Risk Identified	No Risk Identified	No Risk Identified	The Project has implemented a project staffing approach that is reasonable and practical given CRGC's staffing constraints and ability to meet ongoing operational needs.
Communication Strategy	No Risk Identified	No Risk Identified	No Risk Identified	The Project's strategy for communications is consistent with common project management practices.
Acquisition Planning	Complete	Complete	Complete	The Project's acquisition planning was completed in a prior phase.
Vendor Management Planning	No Risk Identified	No Risk Identified	No Risk Identified	The Project is utilizing standard practices for managing its vendors.
People				
Organizational Change Management (OCM)	Risk Being Addressed	Risk Being Addressed	No Risk Identified	As a result of the recent training sessions, staff confidence in the new system has notably increased. As the Project moves forward, the focus is beginning to shift toward what will happen after the system goes live next month.



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Area of Assessment	Risk Level			At-a-Glance Assessment
	January 2025	December 2024	November 2024	
People (Continued)				
Agency Awareness	No Risk Identified	No Risk Identified	No Risk Identified	The current state of agency awareness is adequate for the Project's current activities and stage in its lifecycle.
Stakeholder Engagement	No Risk Identified	No Risk Identified	No Risk Identified	To-date, the Project's stakeholder engagement activities have been consistent with common project management practices and appear to be adequate for its current activities.
Solution				
Product Configuration	Complete	Complete	Complete	The Project reports that the initial software configuration is now complete.
Requirements Management	Complete	Complete	No Risk Identified	The Project's requirements were defined in an earlier phase and there have been no documented changes in those requirements during Gate 7.
Testing	Risk Being Addressed	No Risk Identified	No Risk Identified	At the time of our assessment, there were 20 reported defects and 65 percent of those were considered medium to high priority. To date, Tyler Technologies has been prompt in addressing defects.
Security	No Risk Identified	No Risk Identified	No Risk Identified	The Project has submitted the required security design documentation to WaTech and is now awaiting final approval, which is expected to occur by the end of this month.



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Area of Assessment	Risk Level			At-a-Glance Assessment
	January 2025	December 2024	November 2024	
Data				
Data Preparation	No Risk Identified	No Risk Identified	No Risk Identified	To-date, the Project has reported that it has not encountered any significant data mapping issues with its first, second, and third data loads.
Data Conversion	No Risk Identified	No Risk Identified	No Risk Identified	Last month, the Project successfully completed its third data conversion. To-date, no significant issues have been reported. The production data load is expected to begin mid-February.
Infrastructure				
Remote Data Center	No Risk Identified	No Risk Identified	No Risk Identified	The CRGC reports that the (Software as a Service) SaaS is accessible and operational.



2. Detailed QA Assessment

Area of Assessment	January 2025 Risk Level	Status	<i>bluecrane's</i> Observations/Findings and Recommendations
Project Management and Sponsorship			
Schedule	No Risk Identified	<ul style="list-style-type: none">• The Project is using a Gantt chart as its primary schedule tool. The Gantt chart schedule incorporates a spreadsheet with details on start/end dates, durations, progress reporting, and assigned responsibility.• Reviews and updates to the schedule occur on a weekly basis.• The Project completed its Gate 7 period of activities in December.• The Project is currently conducting its Gate 8 activities, which consist of:<ul style="list-style-type: none">○ Solution and validation testing○ OCM tasks○ Readiness assessments○ Go-live	<p>In December, the Project completed its Gate 7 phase activities. Beginning this month, the Project has entered its Gate 8 phase which consists of the final tasks for go-live. The go-live is scheduled to occur between February 19 and February 23. At the time of our assessment, all Gate 8 activities were on schedule.</p>



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Area of Assessment	January 2025 Risk Level	Status	<i>bluecrane's</i> Observations/Findings and Recommendations
Project Management and Sponsorship (Continued)			
Scope	Complete	<ul style="list-style-type: none"> The Phase II project scope statement is included in the PMP, and the scope is being managed by the project manager. Any additions or modifications to the scope must be approved by the Project's Executive Sponsor and go through the Project's formal Change Management process. The Project's scope management practices are consistent with industry best practices and have been adequate for the size and complexity of the ADR Project. 	<p>The Project's scope has been stable for almost a year. The scope for go-live has been set. Given the solution's extremely low defect rate and the lack of scope changes for over a year, this risk category is closed.</p>
Budget	No Risk Identified	<ul style="list-style-type: none"> The Project's 2023–2025 budget is defined in the Project's approved IP and in the PMP. The PMP describes the Project's budget processes and practices. The CRGC staff prepare monthly budget reports which are shared with the Project's governance structure. 	<p>The Project reported that it was continuing to perform within its approved budget. Our assessment found that the Project's budget is adequate to meet its remaining Phase 2 activities. Furthermore, in July, CRGC completed a Policy Option Package for its Phase 3 effort, which is primarily ongoing support activities.</p>



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Area of Assessment	January 2025 Risk Level	Status	<i>bluecrane's</i> Observations/Findings and Recommendations
Project Management and Sponsorship (Continued)			
Project Sponsorship and Governance	No Risk Identified	<ul style="list-style-type: none"> The Project's governance structure is defined in the IP and the PMP. The Project's governance structure includes an Executive Steering Committee which meets on a monthly basis. The Project's Executive Sponsor provides oversight and guidance to the Project. Additionally, most authorities reside with the Executive Sponsor. 	The Project's current governance structure is providing adequate direction and guidance to the Project. The Executive Sponsor demonstrates commitment to the Project and is actively engaged in its activities.
Project Management Processes	No Risk Identified	<ul style="list-style-type: none"> The Project is being managed by ESA and includes a project manager and project coordinator. The Project has an approved PMP which is in place and being adhered to. 	Our assessment found the PMP to be consistent with industry best practices and in accordance with PMBOK standards.
Risk and Issue Management	No Risk Identified	<ul style="list-style-type: none"> The Project's PMP describes the Project's risk and issue management process. The Project has developed a risk and issue log. Risks are reviewed on a weekly basis during the project status meeting. 	The Project's written risk and issue management process is consistent with industry best practices. Additionally, the risk and issue log format should be adequate for managing risks and issues.



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Area of Assessment	January 2025 Risk Level	Status	<i>bluecrane's</i> Observations/Findings and Recommendations
Project Management and Sponsorship (Continued)			
Project Staffing	No Risk Identified	<ul style="list-style-type: none"> The Project is being managed by ESA and includes a project manager and project coordinator. The Project's primary staffing resources will consist of ESA and Tyler Technologies resources. The Project has defined the roles for the ESA and CRGC Project resources to ensure that both sets of resources are used in an efficient manner. 	<p>The Project reports that it has adequate resources to meet its scope and time commitments. Based on current schedule and budget projections, we agree that the Project is adequately staffed to meet its final commitments.</p>
Communication Strategy	No Risk Identified	<ul style="list-style-type: none"> The Project's PMP includes a communications plan which is focused on the Project's activities. The communications plan identifies roles and responsibilities and includes the frequency and type of communications that are expected to occur. 	<p>The Project's communications practices are consistent with industry best practices and are more than adequate for the Project's size and complexity.</p>



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Area of Assessment	January 2025 Risk Level	Status	<i>bluecrane's</i> Observations/Findings and Recommendations
Project Management and Sponsorship (Continued)			
Acquisition Planning	Complete	<ul style="list-style-type: none"> The Project has completed its acquisition planning. All of the Project's core contracts for its current phase are in place. In March, the Project decided to utilize Tyler Technologies' Enterprise Content Management software and services to meet its document management needs. 	The Project has completed its acquisition planning activities.
Vendor Management Planning	No Risk Identified	<ul style="list-style-type: none"> The Project's PMP includes a vendor management plan. The plan includes compliance standards, monthly reporting, and enforcement practices. 	The Project is utilizing standard practices for managing its vendors.



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Area of Assessment	January 2025 Risk Level	Status	<i>bluecrane's</i> Observations/Findings and Recommendations
People			
Organizational Change Management (OCM)	Risk Being Addressed	<ul style="list-style-type: none"> Several training sessions have been provided by Tyler Technologies. Specifically, in February, CRGC staff attended a three-day, on-site meeting with Tyler Technologies which included some training activities and process discussions. Also in February, the Project team participated remotely in Tyler Technologies' Solutions Orientation Training to increase understanding of the software's capabilities and the activities that will occur during the upcoming current and future state analysis. In September, CRGC participated in Tyler Technologies' software configuration training. In October, the Project completed its OCM plan. 	<p>In January, we continued our extensive interviews with CRGC staff to assess their readiness for the new system, focusing on their concerns regarding the transition and the upcoming go-live date. As a result of the recent training sessions, staff confidence in the new system has notably increased. As the Project moves forward, the focus is beginning to shift toward what will happen after the system goes live. It is important to start to planning for post-go-live protocols and processes to ensure a smooth transition and continuous support for CRGC staff. This proactive approach aims to maintain the momentum of staff confidence and readiness into the operational phase of the new system.</p>
Agency Awareness	No Risk Identified	<ul style="list-style-type: none"> Agency awareness is being managed through the Project's communications efforts. 	<p>The current state of agency awareness is adequate for the Project's current activities and stage in its lifecycle.</p>
Stakeholder Engagement	No Risk Identified	<ul style="list-style-type: none"> Stakeholder engagement is occurring through the Executive Steering Committee and communications to various subject matter experts as appropriate. 	<p>To-date, the Project's stakeholder engagement activities have been consistent with common project management practices and appear to be adequate for its current activities.</p>



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Area of Assessment	January 2025 Risk Level	Status	<i>bluecrane's</i> Observations/Findings and Recommendations
Solution			
Product Configuration	Complete	<ul style="list-style-type: none"> The Gate 7 product configuration activities consist of finalizing the business process flow and finishing the software configuration. The Project's activities associated with product configuration are consistent with common practices for configuring SaaS systems. The Project reports that activities are occurring consistent with Tyler Technologies' methodology. 	<p>The Project reports that the initial software configuration is now complete. To-date, no significant defects have been identified. However, we do acknowledge that testing of this initial configuration will continue until the end of the year. Regardless, we have designated the product configuration as complete.</p>
Requirements Management	Complete	<ul style="list-style-type: none"> The Project has established an Requirements Traceability Matrix (RTM) which is based on the Request for Proposal (RFP) and Tyler Technologies' response to that RFP. Requirements are grouped into three categories: (1) performance, (2) technical, and (3) business. The RTM describes how each requirement is expected to be tested. In February, during the on-site visit, CRGC, ESA, and Tyler Technologies reviewed the documented requirements and learned how the software will meet those requirements. 	<p>The Project's requirements were defined in an earlier phase and there have been no documented changes in those requirements during Gate 7.</p>



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Area of Assessment	January 2025 Risk Level	Status	<i>bluecrane's</i> Observations/Findings and Recommendations
Solution (Continued)			
Testing	Risk Being Addressed	<ul style="list-style-type: none"> In Gate 5, Tyler Technologies conducted a number of preparatory activities during the first 60 to 90 days of their engagement. Those activities are complete. Gate 6 testing activities were comprised of mainly creating testing materials such as use cases and test scripts and conducting some early business requirements testing. These activities are complete. Gate 7 testing activities consist of validating the configuration with converted data. These activities are expected to complete this month or in early January. Full Regression and UAT will occur in early 2025. We do note, however, that it is not the traditional UAT which typically concludes with software acceptance. The Project's testing methodology consists of three periods of UAT—one after each data load. The final acceptance of the software will occur early next year. 	<p>The Project has been testing the software with the converted data. At the time of our assessment, there were no reported defects.</p> <p>In addition, the Project is continuing to test the software configuration and is expected to complete end-to-end testing by the end of the month. At the time of our assessment, there were 20 reported defects and 65 percent of those were considered medium to high priority. To date, Tyler Technologies has been prompt in addressing defects. However, if Tyler Technologies is unable to address all of those defects before the first week of February, we do encourage the Project to have Tyler focus on resolving those defects that are “go-live critical”, meaning there are no work arounds and the defects would prevent CRGC's ability to meet its statutory and regulatory duties.</p>
Security	No Risk Identified	<ul style="list-style-type: none"> According to the Project's high-level schedule, security design reviews and processes are expected to occur from the fall of 2023 through the beginning of 2025. 	<p>The Project has submitted the required security design documentation to WaTech and is now awaiting final approval, which is expected to occur by the end of this month.</p>



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Area of Assessment	January 2025 Risk Level	Status	<i>bluecrane's</i> Observations/Findings and Recommendations
Solution (Continued)			
Tools	Complete	<ul style="list-style-type: none"> The Project is using Egnyte Collaborate for file sharing and Confluence for tracking and storing meeting notes and other administrative items. 	The Project's tools have been in place and operational for its entire lifecycle. Those tools have been adequate for managing the Project's activities and are not expected to change for the Project's duration.
Implementation	Not Started		
Data			
Data Preparation	No Risk Identified	<ul style="list-style-type: none"> Data preparation activities (i.e., requirements, mapping, and cleansing) began in Gate 5 and will end in Gate 7. The data preparation activities for Gate 8 will consist of the final cleansing 	To-date, the Project has reported that it has not encountered any significant data mapping issues with its first, second, and third data loads. Starting with the first conversion and continuing this month, the Project and business owners are verifying the accuracy of the data mapping using the new system. At the time of our assessment, there were no reported data conversion defects.
Data Conversion	No Risk Identified	<ul style="list-style-type: none"> During Gate 7, the Project plans to conduct three data conversions starting in August and concluding prior to go-live. Gate 8 data conversion activities will consist of the production data load. 	Last month, the Project successfully completed its third data conversion. To-date, no significant issues have been reported. The production data load is expected to begin mid-February.



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Area of Assessment	January 2025 Risk Level	Status	<i>bluecrane's</i> Observations/Findings and Recommendations
Infrastructure			
Remote Data Center	No Risk Identified	<ul style="list-style-type: none">• The permit management software that CRGC will utilize is provided by Tyler Technologies as SaaS, which is hosted at one of their data centers.• The SaaS solution became available to CRGC staff in February 2024.	To-date, CRGC reports that the SaaS solution is accessible and operational.
Technical Help Desk	Not Assessed		



Appendix A: ADR Project Background

To implement the National Scenic Area Act, the bi-state CRGC is responsible for tracking implementation of the National Scenic Area (NSA) Management Plan, including:

- *Ensuring* compliance with all aspects of the Management Plan and land use rules among the six counties in the NSA
- *Monitoring* development trends, implementation effectiveness, and agency activities in the six counties in the NSA
- *Tracking* all the development that occurs in the six counties in the NSA
- *Enforcing* compliance and issuing notice of violations if landowners are out of compliance with permit conditions, and working with them to resolve the violations
- *Tracking* and comparing scenic, natural, cultural, recreational, and economic data to create a Climate Change Action Plan for the NSA to respond to priorities of the governors of both Washington and Oregon to address and mitigate climate change
- *Responding to* public records requests easily and efficiently within a short timeframe
- *Satisfying* Performance Measures (for both Oregon and Washington)

For at least 15 years, the CRGC has relied upon Microsoft Access as the main database system to store, maintain, and track the information needed to fulfill these requirements. Over time, the Access database has been altered and adapted to include additional data fields while other fields have been “orphaned.” There are currently over 100 fields in the Access database, many of which have not been used consistently over time. Thus, values for a given field may vary widely as different users have entered data with different meanings. This variability and inconsistency make searching data and performing analytical work difficult at best. Many data fields require information from CRGC’s Geographic Information System (GIS) but, since it is not possible to integrate Access and GIS, fields cannot be automatically populated with accurate and consistently-formatted data. Instead, the data must be manually entered which requires more time and is susceptible to human error. The CRGC also stores hundreds of boxes of historic paper documents that have not been digitized and indexed, making earlier records practically impossible to retrieve without countless hours of searching.

The ADR Project is intended to make CRGC data easily searchable and linked to the agency’s GIS. The envisioned new solution will be configured for CRGC’s current and future needs, providing better organized information and allowing CRGC to be more responsive to stakeholder needs. The CRGC will be able to better serve residents and county planning departments who need information about specific parcels of land and development impacts on resources.



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Specifically, replacing the Access database will improve efficiency by standardizing CRGC's operating procedures in digital/online forms and eliminating cumbersome manual data entry/re-entry work for CRGC's planners, county planners in the NSA, and landowners who require timely permits. The new solution will allow CRGC to centralize historic case work, land use permit files, and correspondence to enable both CRGC's planners and legal team to respond to requests for development reviews, permits, and public records more quickly and accurately. It will also facilitate reporting of metrics used to assess how well CRGC is implementing the NSA Act to protect Gorge resources and support economic development.

The Project is being implemented in two phases. Phase 1 is completed and consisted of:

- Conducting a needs assessment
- Design of a new cloud-based workflow and data management system
- Completion of a feasibility study
- A feasibility study review and readiness assessment
- Procurement of project management services
- Establishment of a governance committee
- Procurement of an implementation vendor

Phase 2 is currently underway and consists of:

- Project management and QA services
- Implementing a cloud-based solution to replace CRGC's current access database
- Converting legacy system data
- Scanning, digitizing, geo-referencing, and indexing paper archival files that were not digitized during Phase 1
- Merging digitized information into a new system
- Planning and transitioning maintenance and operations activities
- Modifying CRGC's website



Appendix B: *bluecrane's* QA ASSESSMENT FRAMEWORK

We typically begin our QA assessments using a framework or “taxonomy” of areas for review and assessment. In performing QA reviews over the past 18 years, we have found this framework to be a valuable tool for (1) summarizing assessments into five areas that all stakeholders can “get their arms around” and (2) expanding discussions to a level of detail that is appropriate for specific management and technical audiences. We utilize this framework in our formal reporting and provide two different sections in each of our reports: one at the summary level and one at a more detailed level.

We begin our framework with a “roll-up” of all aspects of a project into the following five Project Areas:

- Project Management and Sponsorship
- People
- Solution
- Data
- Infrastructure

We then de-compose the five Project Areas listed above into the next lower level of our assessment taxonomy. We refer to this next lower level as the “area of assessment” level. The list of areas of assessment grows over the life of a given project, and it often includes areas of assessment unique to a given project. Regardless of where a project is in its lifecycle, we have found that there are some areas of assessment that occur over and over again. Figure 1 on the next page depicts a number of typical areas of assessment that occur on most projects—and for which we have pre-prepared QA inquiries that we present in Section 3 of this plan.

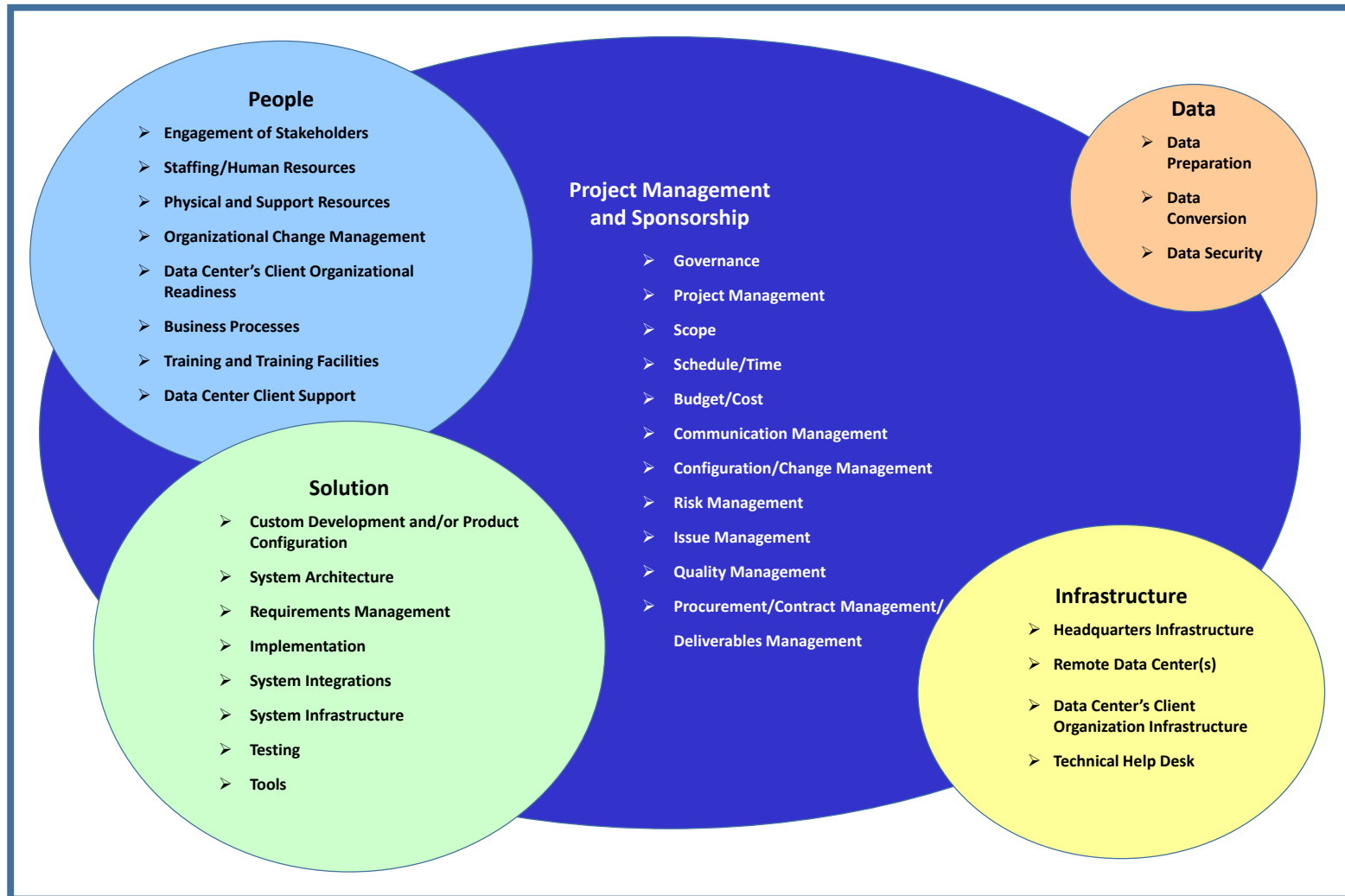


Figure 1. *bluecrane's* QA Framework



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We recognize that there are certain qualitative and subjective elements to any assessment framework. It is possible that CRGC might believe that an area of assessment that we have designated under, for example, “People” should be under “Solution.” We are fine with accommodating those kinds of modifications to our framework to facilitate the understanding of and consistency with the ADR Project. The point is not “how” we classify a given area of assessment. The point of our framework is to help ensure that no critical areas are missed!

We also wish to note that it is not our framework’s intent or practice to duplicate the Project’s management processes and activities—meaning we do not follow and analyze each task and each deliverable that our clients are tracking in their project management software (such as Microsoft Project). Rather, we identify those groups of tasks and deliverables that are key “signposts” in the Project that lead to project success. For example, we know that there are numerous tasks that may slip a few days or even weeks, get rescheduled, and do not have a major impact on the Project. We also know that there are always a number of significant “task groups” and deliverables that should be tracked over time because any risk to those items—in terms of schedule, scope, or cost—have a potentially significant impact on the Project’s overall success. Those types of “task groups” then become our focus, which will ultimately become part of our framework and assessment activities. These “task groups” vary depending on what the Project is doing at any particular time and what is critical to meeting the Project’s next major signpost. It is our practice to discuss what those signposts and upcoming task groups will be with our clients before they become a focus in upcoming assessments.

For each major assessment area within our framework depicted in Figure 1, we document in our monthly QA reports our assessment results and any issues and/or risks that we have found over the last month, as well as our high-level recommendations for addressing the risks. For each focus area, we perform the following assessment:

- Planning – is the project doing an acceptable level of planning?
- Executing – assuming adequate planning has been done, is the project performing tasks in alignment with the plans the project has established?
- Results – are the expected results being realized? A project that does a good job of planning and executing their plans but does not realize the results expected by participating partners and other stakeholders, is a less than successful project. Ultimately, results are what the project is all about!

Assessed status is then rated at a macro-level using the scale shown in Table 1 below.



Table 1. *bluecrane*'s Monthly Assessment Status Color Coding Definitions

Assessed Status	Meaning
High Risk	Project management must address, or the entire project is at risk of failure; these risks are "show-stoppers"
Risk	Significant enough to merit management attention but not one that is deemed a "show-stopper"
Risk Being Addressed	Risk is being adequately mitigated. The risk may be ongoing with the expectation it will remain blue for an extended period of time, or it may be sufficiently addressed so that it becomes green as the results of the corrective actions are realized
No Risk Identified	"All Systems Go" for this item
Not Started/ Assessed	This particular item has not yet started or is not yet assessed
Complete or Not Applicable	This particular item has been completed or has been deemed "not applicable" but remains a part of the assessment for traceability purposes