



# Final Monthly IV&V Report

*As of November 2025*



# Plante Moran Independent Validation & Verification Approach



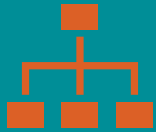
- We focus on early detection and correction of errors, enhance management insight into risks, provide observations and recommendations, and ensure compliance with project scope, schedule, and budget requirements. We will assess the health of the project on an ongoing basis, focusing on the artifacts and deliverables being produced by the project team.
- The principles that guide the work we perform include:
  - Complete vendor independence provides integrity to our observations.
  - Transparency in all observations and issues as early as possible.
  - Collaboration with SI, the State project team, and the key stakeholders.
  - Advise on issues and potential opportunities to improve.
  - Being respectful of staff time and project schedule.



# Transformation Phase 2



# IV&V Recommendations Transformation – Business



Agencies are encouraged to take an active role in Phase 2, which centers on refining and optimizing their own business processes. This collaborative approach ensures that agencies are not just participants, but key stakeholders shaping the future state of operations.



Engage stakeholders early to develop requirements and establish the overall roadmap.

User buy-in to the business requirements is essential for project success for transformation.



Focus on identifying and addressing the issues or gaps that create the greatest obstacles or inefficiencies.

Early and major wins encourage adoption.  
Identify and socialize benefits.



# IV&V Recommendations Transformation - Technical



Understand and document CGI's system schedule for upgrades, patches, and general maintenance of the hosted environments.

Communicate CGI's schedule for the hosted environments to relevant stakeholders to minimize disruptions to business operations.

Develop and maintain a project environment management plan to support ongoing project work such as configuration, testing, and reporting development.



# Change Management

**CELEBRATING THE JOURNEY**  
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1996: PAM Corporate Finance LLC (PACF) is founded.

1995: Firm creates domain and later launches website.



The New York Times ranked Plante Moran as "100th Best Firm to Work For" in 1998.



2002: Firm is chosen by the U.S. Department of Treasury to help investigate the Enron collapse; Plante Moran Trust is created.

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2003: First international office in Shanghai, China.

2012: First-Ever Global Workplace Recognition with International Accounting Bulletin's Employer of the Year award.

2011: Plante & Moran drops the "&"; becomes Plante Moran.



## Focused and ongoing during transformation

### Document and communicate often

Document the changes, new processes, upcoming updates regularly.

Establish review sessions when planning out future initiatives.

Update business process procedures and enforce new ways of doing business in the system.

### WIIFM

“what’s in it for me?”

Remind agencies why using the system to the fullest will help with their job tasks.

Conduct regular user experience (UX) reviews.

Refine the message.

### Focus on transformation training

Initiate a regular cadence of training sessions.

Refresh materials and consistently train on new transformed processes.



# Budget & Resource Availability



## Budget Availability

- During the Transformation phase, it is essential for business owners and agency subject matter experts to take an active role in articulating detailed business requirements and leading the validation of new system configurations and reports. To ensure the successful completion of this phase, a comprehensive roadmap should be created that outlines the resource needs and associated costs. This plan should be presented to stakeholders to secure alignment and budget approval for the resources necessary to support the Transformation phase activities.

## Continued Production Support by the project team will consume project budget.

- Project resources have remained actively involved in post-Hypercare support for system modules, as previously reported. This ongoing commitment has delayed the completion of current project tasks and negatively affected product quality at go-live. Now that Advantage 4 operates as a production system with dedicated support from the CGI local unit, OPM should transition away from this dual role, empower other agencies to continue post-production support, and concentrate fully on advancing the project.



# Optimization



# IV&V Recommendations Optimization



Review status with agencies after each module implementation.

- What was successful?
- What was challenging?
- What still needs to be addressed?
- What would you change?
- What is your sense of employee buy-in?

Continuous digital improvement.

- Stand up operational & management dashboards.
- Put informational tools into user hands (queries, reports, and dashboards).

Once phase 2 is nearing completion, create a 12–18 month optimization roadmap.

- Identify feature enablement, process redesign, and revised workflows to improve business processes where optimal transformation had not occurred.



# IV&V Recommendations Optimization



## Risk management is a continuous process

- Regularly assess risks.
- Control and review access.
- Segregation of duties awareness.
- Data quality is controlled.

## Develop agency power users to

- Provide expert knowledge of their department's business including policies and procedures.
- Assist with troubleshooting application-related problems.
- Support configurations and helps translate functional business requirements into technical requirements/specifications.
- Train new end users or coordinates the training with the support team to gain user acceptance.
- Contribute to the ongoing process development.



# Governance & Sustainability



## Prioritize

### **Prioritize Project Governance**

Restart the Project Governance process so that there is a strategic and operational framework for the remainder of the project and for the post-project period. The Governance Committee should establish priorities and the process on how priorities are communicated and approved as well as monitor risk management.



## Expand

### **Expand the Executive Committee**

Incorporate Business Process Owners whose operations will be most impacted by the Phase 2 Transformation. Their participation will ensure valuable input into strategic decisions that will shape the State's business processes for years.



## Establish a Sustainment Organization

- Establish the sustainment organization that will remain once the project is complete to continue the administration of the system.
- Business owners should drive business process change across the enterprise and applications.
- Review releases and new features for potential deployment through the life of the system.
- Invest in sustainment resource training and development.
- Establish the CGI relationship team who will work with CGI throughout the life of the system, including discussing new release feature sets.
- Assign the resources and processes that will be used to maintain and administer the system for the long term.
- Support and troubleshoot the business process and the application-related issues with the business owners, agencies and end users.



# Congratulations!



OPM

Project Staff

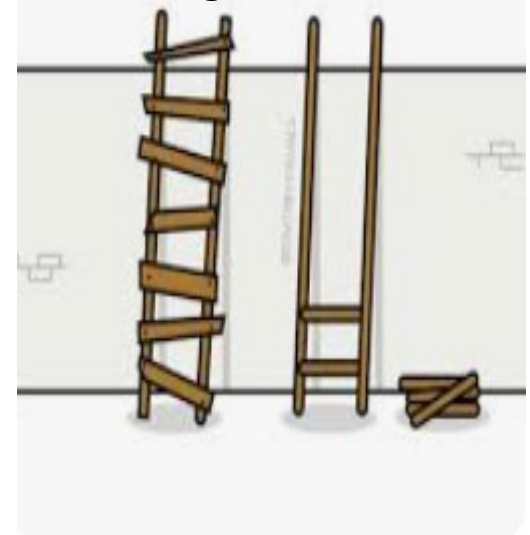
CGI Leadership and Staff

BD Leadership and Staff

Executive Advisory Committee

Be Proud and celebrate what you Accomplished

Getting Stuff Done





# Thank you for the Opportunity to Work with You and the Trust You Placed with Us

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