



Monthly IV&V Report

As of September 2024



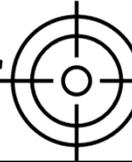
plante moran

Audit. Tax. Consulting.
Wealth Management.

100 years



Program Status - September



Target go-live
Phase 1A Jan '25



Overall Program Status

Overall	<ul style="list-style-type: none"> Amount of remaining work effort across the timeline puts go-live at risk. NDOT has moved out of MVP, which adds new work to both Phase 1A and 1B. Scope changes continue to challenge. Technical work for conversion, interfaces and data warehouse continue to challenge.
Scope	<ul style="list-style-type: none"> Scope changes, e.g., different LMS platform. SEFA reporting, Budget structure 90, and COA changes continue to challenge. Conversion completion and validation may not be complete in time for UAT or satisfy requirements. NDOT interfaces for MVP may not all be defined.
Schedule	<ul style="list-style-type: none"> Lack of a contingency plan for the schedule for Financial MVP – accepted risk. Impact of FIN go live on Phase 1B (now with increased scope) and Phase 2 project schedule is unknown. CGI interface and conversion development and visibility continues to be a concern as it was identified in the EC to be lagging. Lagging on completion of technical work for testing and go live.
Budget	<ul style="list-style-type: none"> The State has a change control budget to support additional needs but may be challenged for the overall project by the risk of pushing out go live dates and scope.
Quality	<ul style="list-style-type: none"> There is no formal design sign-off. Defect Log management should be robust at this point in the project phase. The amount of testing occurring for the first time in UAT may impact quality.
Resources	<ul style="list-style-type: none"> The MVP Phase 1A post go-live support plan has not been finalized and communicated. Tech resources are challenged for timely completion of work.



Look Forward

Target go-live
Phase 1A Jan '25



OPM Tech	<ul style="list-style-type: none"> Data Warehouse substantial completion for adequate testing by go-live. Scope, design, & test of NDOT interfaces required for Phase 1A go-live. Reports completion for adequate testing by go-live.
CGI Tech	<ul style="list-style-type: none"> Conversions completion for adequate testing by go-live. Reports completion for adequate testing by go-live.
FIN	<ul style="list-style-type: none"> Ability to adequately test all the lagging tech team work as only a short window will be available before go-live.
HRM	<ul style="list-style-type: none"> Delay in parallel testing. Dependency on lagging conversions.
OCM	<ul style="list-style-type: none"> Drive all required Nevada staff to sign up to training courses. Approximately 400 staff still need to register.
OPM	<ul style="list-style-type: none"> Post Go-Live Governance Plan should be substantially complete. Plan support structure, tools, and staffing necessary for Phase 1B. Plan what the January 2025 go-live includes and the MVP backlog to address in the post-implementation period.
CGI	<ul style="list-style-type: none"> Completion of work relates to environment security. Environment availability for testing, training and parallel testing. Readiness and achieve phase activities being tracked transparently.



Key RAID items since last report



Each IV&V RAID item has been documented in the Observations and Recommendations Spreadsheet

Risks Open *	8	7	5	8	5	10	6	12
Actions Open	4	0	8	4	11	8	5	6
Issues Open	1	6	5	3	42	45	22	16
Decisions Recorded**	3	2	8	5				
Decisions Open**	1	0	5	4				

* Includes Candidates

** IV&V Decisions – IV&V not making decisions, but many Action items can be considered Decisions when adjudicated



Risk Action Issues Decisions



2007: Plante Moran Cares launches.

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

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

CELEBRATE THE JOURNEY
1998: Named for the first time to Fortune magazine's list of "100 Best Companies to Work For."

1996: Plante Moran CRESA is formed.

1990: Plante Moran Financial Advisors registers with the SEC.

1986: Named "Best Subdivision" by "The National Highways Administration" as a "50th."

1996: PSM Corporate Finance LLC (PMCF) is founded.

1995: Firm creates domain and later launches website.



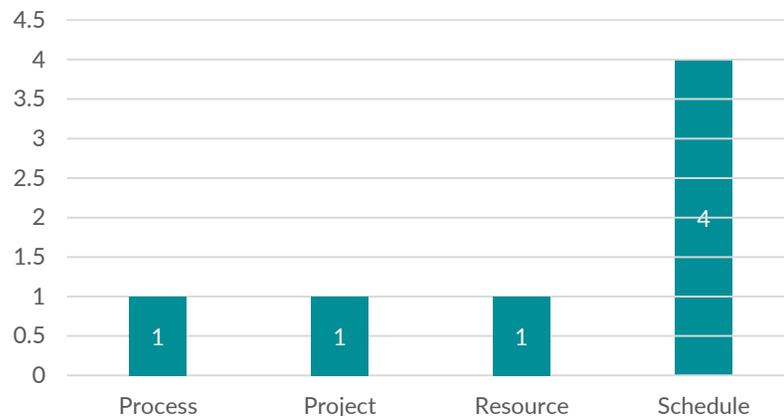


Risk Summary

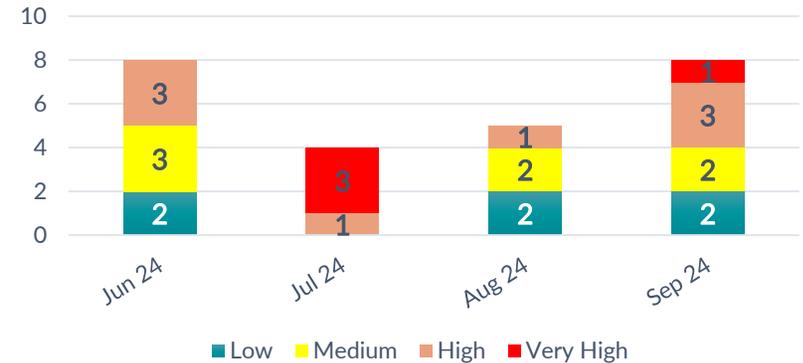


- There are 7 open risks on the NV Project Risk Log as of the end of September.
- There is 1 open risk candidate.
- IV&V has identified 12 Risks which can be found in the accompanying Observations and Recommendations spreadsheet.

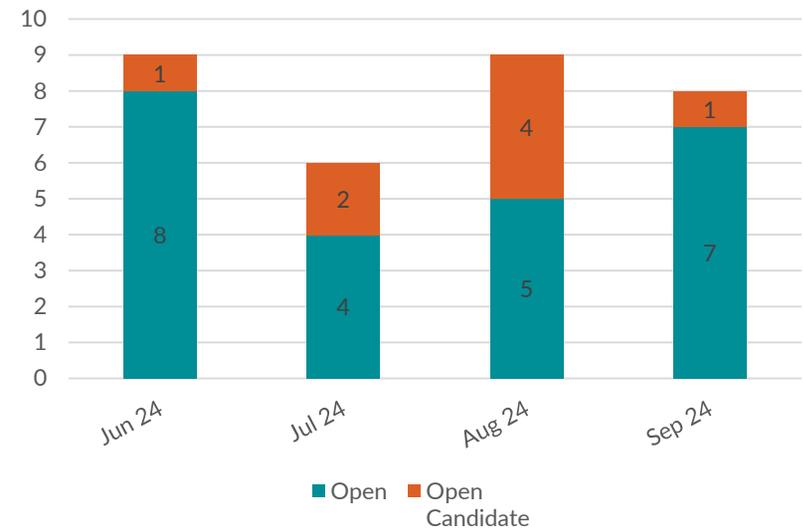
Open Risks by Category



OPM Open Risks by Impact Trend by Month (Not including Candidates)



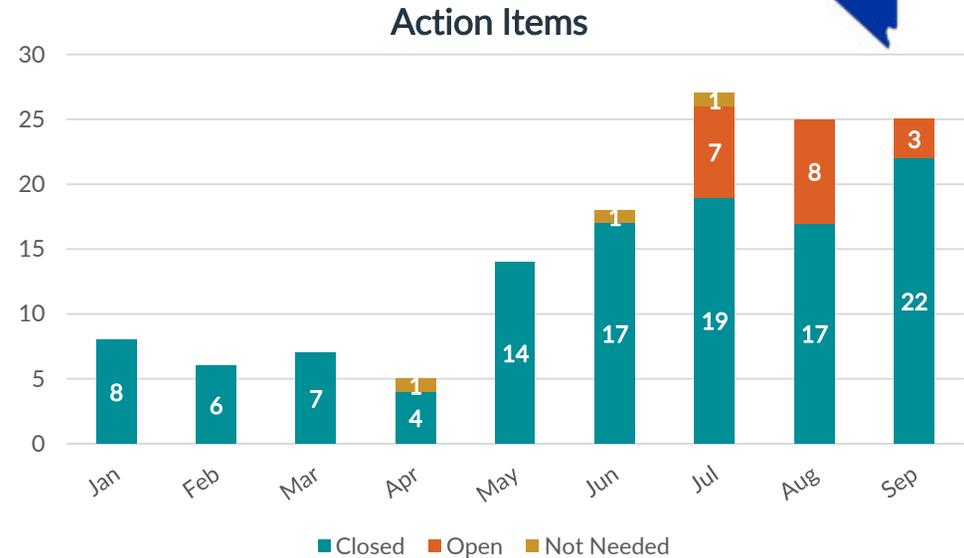
Open Risks and Open Risk Candidates Trend by Month





Actions Summary

- There were 4 Actions open as of the end of September.
- OPM days open increased slightly over August but remains significantly lower than previous months.
- IV&V has 6 open Action Items in the accompanying Observations and Recommendations spreadsheet.



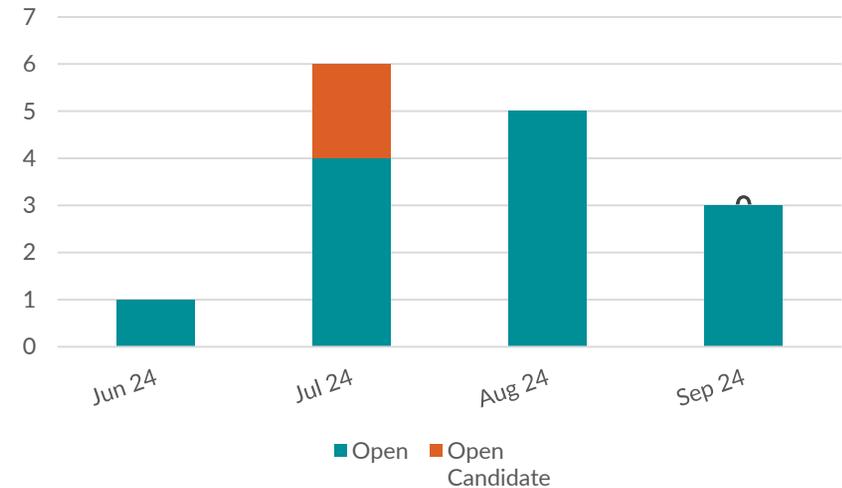


Issue Summary

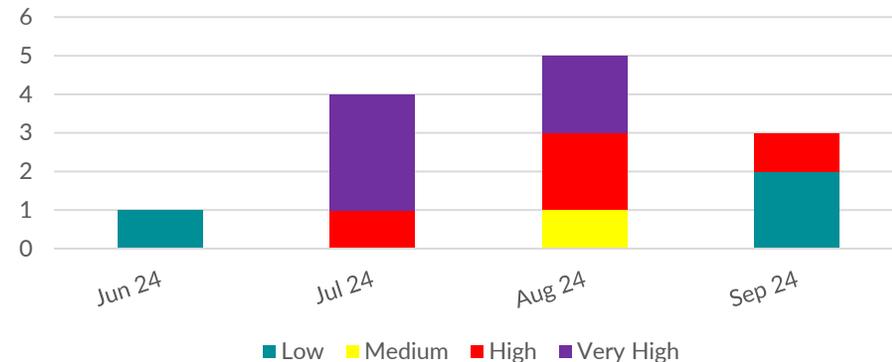


- OPM had 3 open issues as of the end of September.
- No additional issues were identified by the Project Team in September.
- IV&V has identified 16 open Issues.

OPM Open Issues and Open Issue Candidates Trend by Month



OPM Issues Impact Trend by Month (Not including Candidates)



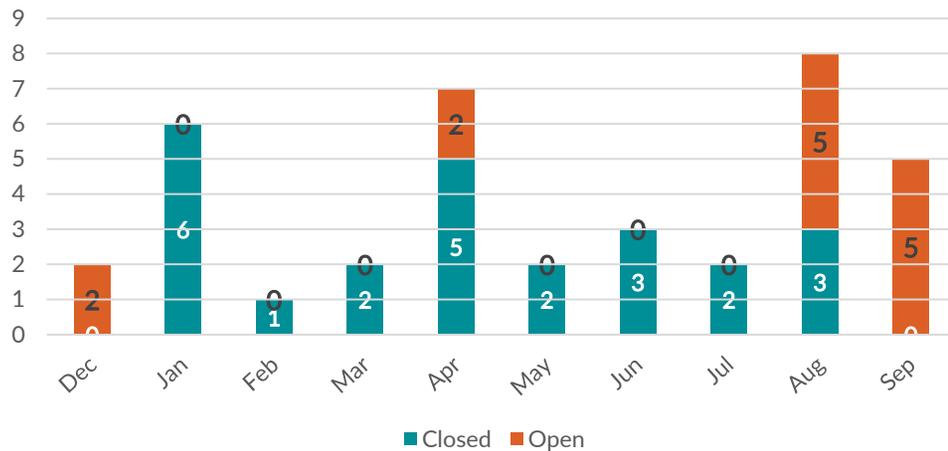


Decisions

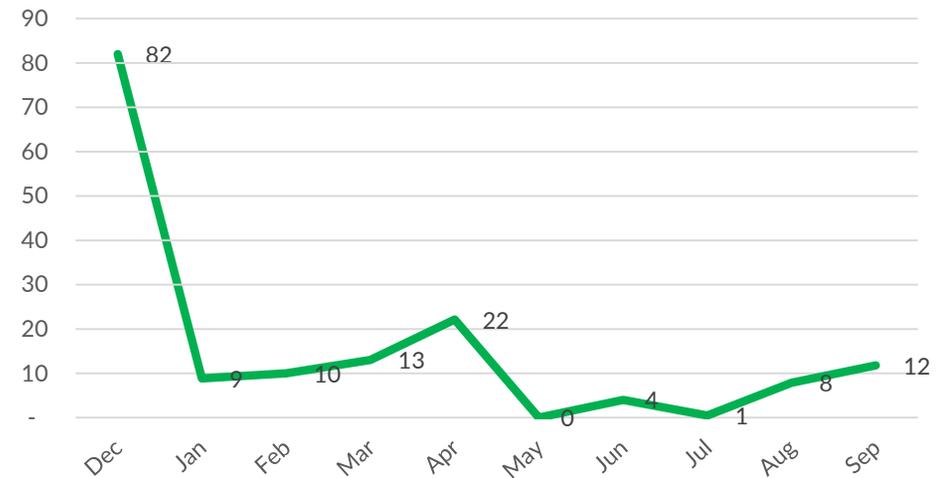


- 39 Decisions to Date by OPM.

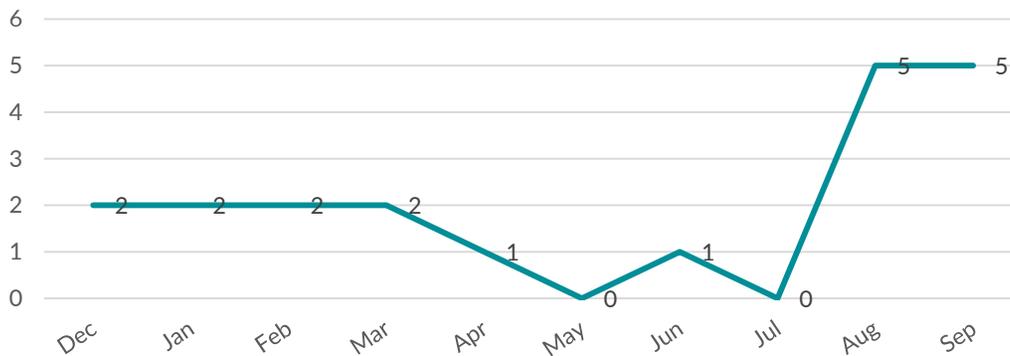
OPM Decision Log Entries



OPM Decisions Average Days Outstanding



OPM Decisions Open at the End of Each Month





1980: Plante Moran Financial Advisors registers with the SEC.

1982: Plante Moran Financial Advisors registers with the SEC.

1986: Plante Moran CRESA is formed.

1998: Named for the first time to Fortune magazine's list of "100 Best Companies to Work For."

1996: PSM Corporate Finance LLC (PMCF) is founded.

1995: Firm creates domain and later launches website.

CELEBRATE THE JOURNEY



2003: Firm forms Diversity Council.



2003: First international office in Shanghai, China.

PM cares

Bugs Reported

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

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

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





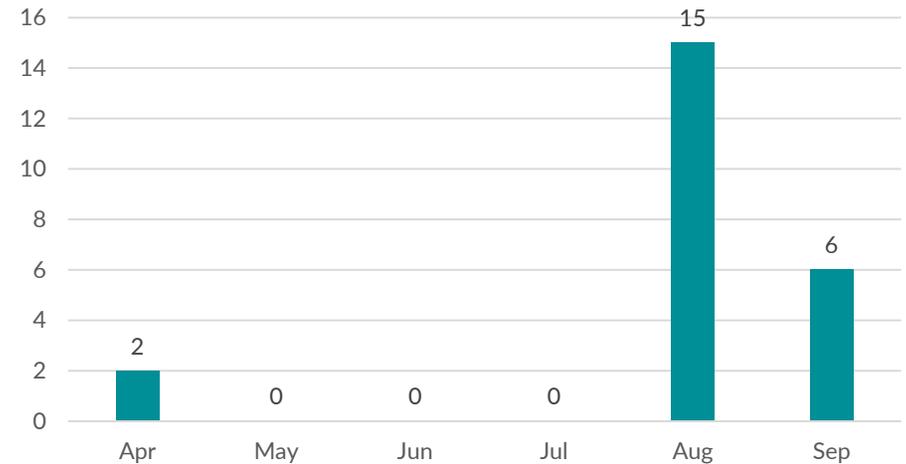
Bugs Reported



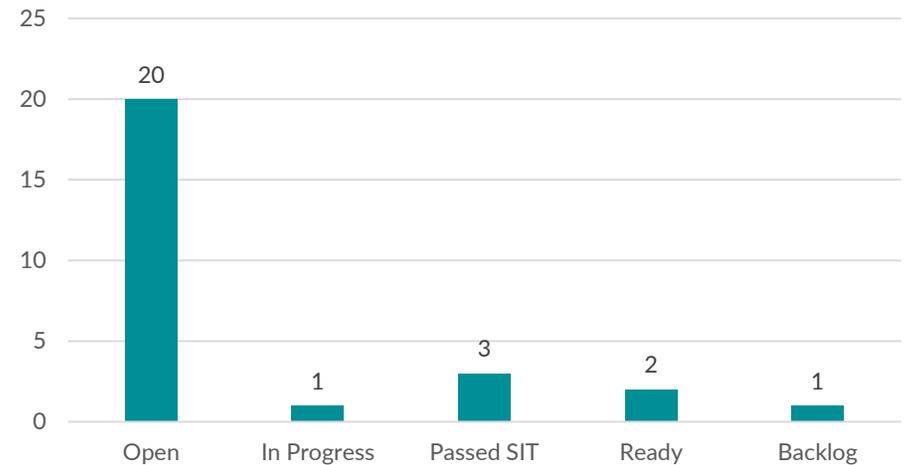
- 27 bugs have been reported in Jira
- Of these, 20 are still in Open status

*Data is not available for the dates when bug statuses are changed. Plante Moran is only able to track open dates and provide a snapshot of statuses as they existed in early October.

Bugs Reported by Month



Status of Reported Bugs





Contracts and Budgets Deliverables

CELEBRATE THE JOURNEY
1998: Named for the first time to Fortune magazine's list of "100 Best Companies to Work For."

1996: Plante Moran Financial Advisors registers with the SEC

1996: Plante Moran CRESA is formed.

1996: PSM Corporate Finance LLC (PMCF) is founded

1995: Firm creates domain and later launches website.

1995: Member of world's leading "100 Most Influential Companies" ranked in "Entrepreneur" magazine



2003: Firm forms Diversity Council.



2003: First international office in Shanghai, China.

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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Assessment of Contract Documents



CGI Technologies

» Contract Highlights

- ❑ Covers Financial and Human Resource systems SaaS, including:
 - ❑ Phase 1A MVP FIN
 - ❑ Phase 1B MVP HRM including Payroll
 - ❑ Phase 2A FIN Business Transformation
 - ❑ Phase 2B HRM Business Transformation
- ❑ Supporting current CGI Advantage 2 environment
- ❑ **September - No changes having a material effect on budget.**

» Contract

- ❑ Initial contract executed Sep '23
- ❑ Value \$90,225,000
- ❑ Contracted term thru Sep '28

» Contract Amendments

- ❑ CR017 shifted delivery of P1B Training Materials ahead from October to August 2024
- ❑ CR018 amended Cloud Sizing information to fit projected user counts

» Risks

- ❑ Contracted dates for Phase 2 may be extended and the ability to complete within the budget is a risk.



Assessment of Contract Documents



BerryDunn

» Contract Highlights

- ❑ Overall project management support
- ❑ BerryDunn will lead and coordinate all State project activities
- ❑ Program Managers for FIN and HRM; not Technical

» Contract

- ❑ Initial contract executed Feb '24.
- ❑ Value \$771,896.
- ❑ Contract term
 - ❑ June '24
 - ❑ Extension for an additional 27 months

» Contract Amendments

- ❑ *September - No changes having a material effect on budget.*

» Risks

- ❑ Project continuity risk. The period extended does not cover HRM go-live or Phase 2 go-lives.
- ❑ Note: Amendment 3 is expected to be submitted by early 2025 to extend the BerryDunn contract through the life of the CGI Contract.



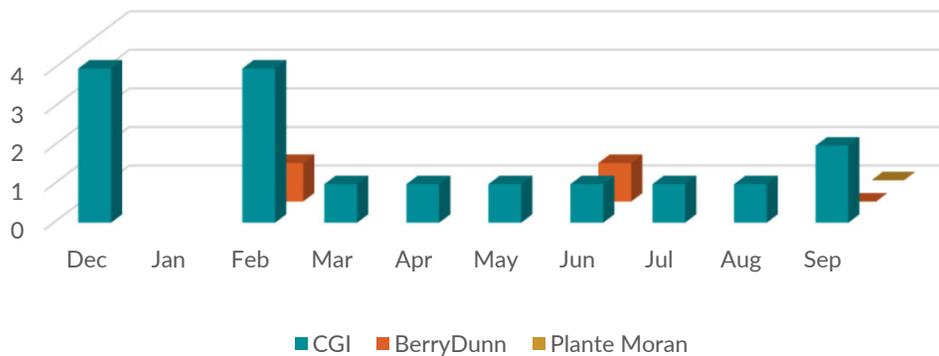
Change Requests



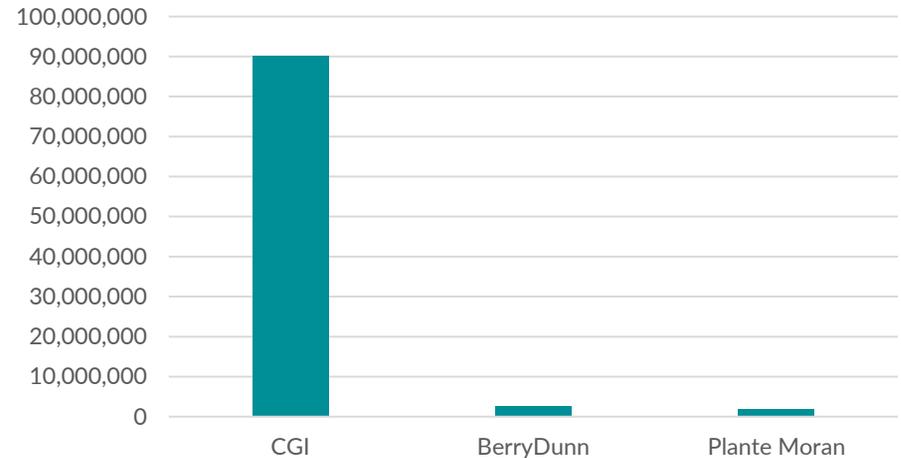
Change Requests and changes to scope – include core decision papers and process changes

	CGI	BerryDunn	Plante Moran
Contract	\$90,225,000	\$771,896	\$1,833,000
CR / Amend		\$1,780,185	
Total	\$90,225,000	\$2,552,081	\$1,833,000

Project Change Requests or Amendments



Contract Value



- September - No change requests were executed having a material effect on budget



CGI Budget FY24 & FY 25



Excluding Software & Change Control

Month	Jul	Aug	Sep	Total
Planned	\$ 1,530,645	\$ 305,645	\$ 1,805,645	\$ 15,491,935
Earned	\$ 350,000	\$ 1,405,645	\$ 230,645	\$ 13,836,290
Actual	\$ 200,000	\$ 1,605,645	\$ -	\$ 13,655,645

Including Software & Change Control

Month	Jul	Aug	Sep	Total
Planned	\$ 1,450,000	\$ 225,000	\$ 1,725,000	\$ 20,807,580
Earned	\$ 350,000	\$ 1,250,000	\$ 230,645	\$ 19,238,225
Actual	\$ 200,000	\$ 1,250,000	\$ -	\$ 18,857,580

Combined Earned Value by Month
excluding Change Control and Software



Combined Earned Value by Month
Including Change Control and Software



*Plante Moran will be presenting totals from FY25 in this and subsequent reports.



BerryDunn & Plante Moran Budget FY24 & FY 25



BerryDunn

Month	Jul	Aug	Sep	Total
Planned	\$ 218,880	\$ 218,880	\$ 218,880	\$ 1,428,536
Earned	\$ -	\$ 244,164	\$ 247,196	\$ 1,250,500
Actual	\$ -	\$ 244,164	\$ 247,196	\$ 1,250,500

- Amendment 1 revised on 5/30/24 increased contract to \$2,552,081 through March 25
- Amendment 2 signed on 7/3/24 added a Program Manager (IT) Role to the contract
- NTE \$2,552,081

Plante Moran

Month	Jul	Aug	Sep	Total
Planned	\$ 61,791	\$ 61,791	\$ 61,791	\$ 276,373
Earned	\$ 296,400	\$ 39,975		\$ 336,375
Actual	\$ 296,400	\$ -		\$ 296,400

- The August invoice for services was submitted on 10/4/24 and will be reflected in next month's report.



Combined 3 Partners Budget FY24



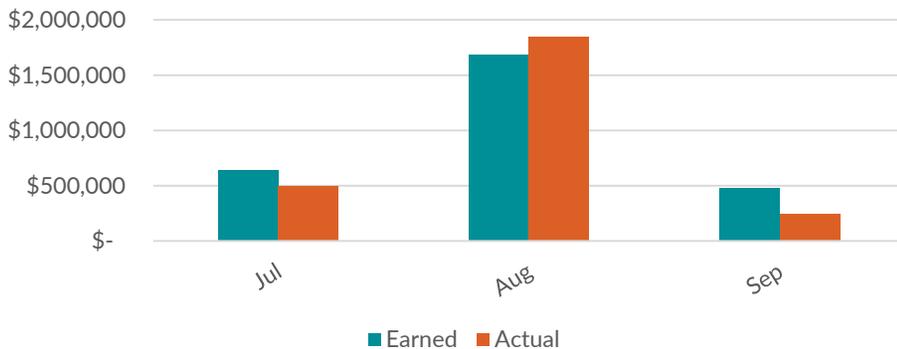
Excluding Software & Change Control

	Jul	Aug	Sep	Total
Planned	\$ 1,811,316	\$ 586,316	\$ 2,086,316	\$ 17,196,844
Earned	\$ 646,400	\$ 1,689,784	\$ 477,841	\$ 15,423,165
Actual	\$ 496,400	\$ 1,849,809	\$ 247,196	\$ 15,202,545

Including Software & Change Control

	Jul	Aug	Sep	Total
Planned	\$ 1,709,589	\$ 505,671	\$ 2,005,671	\$ 22,491,407
Earned	\$ 646,400	\$ 1,534,139	\$ 477,841	\$ 20,825,100
Actual	\$ 496,400	\$ 1,494,164	\$ 247,196	\$ 20,404,480

Combined Earned Value by Month
Excluding Change Control and Software



Combined Earned Value by Month Including
Change Control and Software



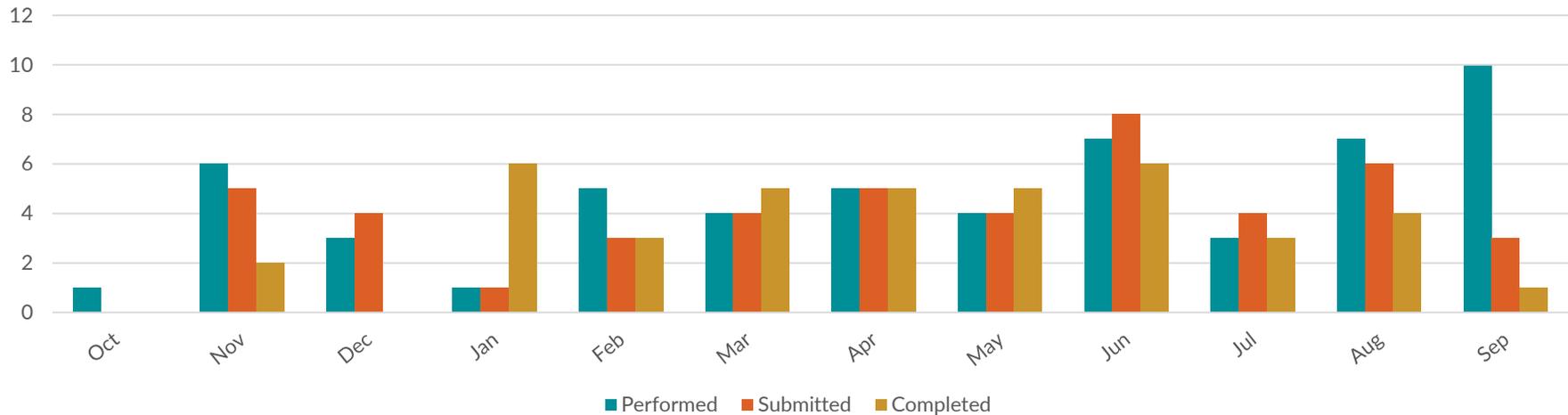


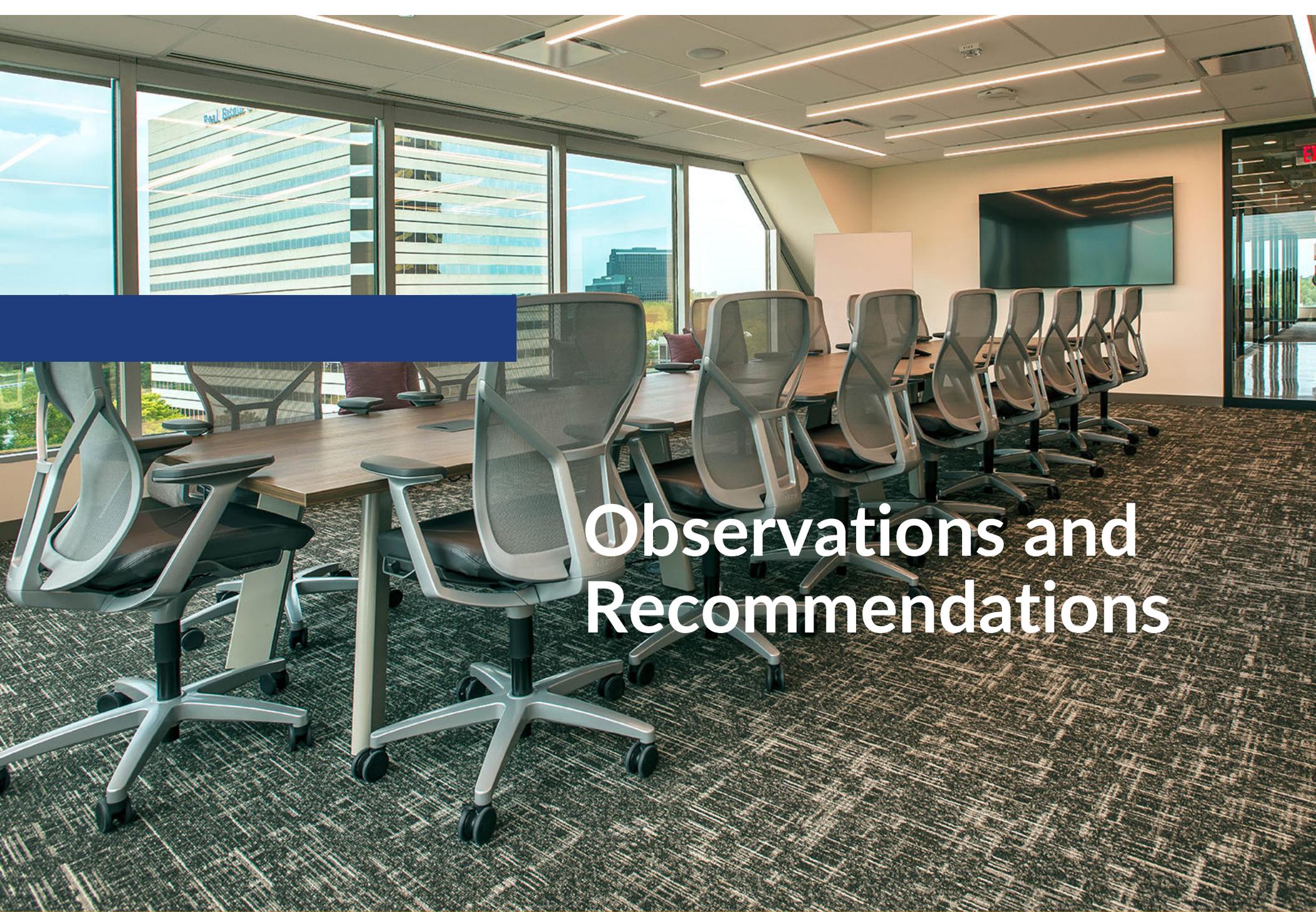
Deliverables



		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Total
CGI	Performed	1	6	3	1	4	3	4	3	5	1	5	7	43
CGI	Submitted		5	4	1	3	3	4	3	7	1	5	1	37
CGI	Completed		2		6	3	4	4	4	5	0	3	0	31
BerryDunn	Performed					1	1	1	1	1	1	1	2	9
BerryDunn	Submitted						1	1	1	1	1	1	2	8
BerryDunn	Completed						1	1	1	1	1	1	1	7
Plante Moran	Performed									1	1	1	1	4
Plante Moran	Submitted										2	0		2
Plante Moran	Completed										2	0		2
Total	Performed	1	6	3	1	5	4	5	4	7	3	7	10	56
Total	Submitted	0	5	4	1	3	4	5	4	8	4	6	3	47
Total	Completed	0	2	0	6	3	5	5	5	6	3	4	1	40

Month Work Performed, Submitted & Deliverable Completed
3 Entities





Observations and Recommendations



The Observations and Recommendations below address items Plante Moran has identified in Slide 2, Program Status. Additional support can be found in the associated document, *Plante Moran Report Out Core NV Sep 2024 Report Attachment Observations and Recommendations*

1924: Elorion Plante founds accounting firm in Detroit, Michigan.



1950: Frank Moran is named partner; firm becomes known as Plante & Moran.

1993: Plante Moran Financial Advisors registers with the SEC.

1994: Plante Moran CRESA is formed.

1999: Named for the first time to Fortune magazine's list of "100 Best Companies to Work For."

2003: Plante Moran Diversity Council.

PM cares
100 Plante Moran Cares initiatives

2002: Firm is deemed by the US Department of Treasury to be a "100% Minority Owned Business" (MBOB).

2005: Firm creates domain "plante.com" and website.

2007: Firm moves to our second office at 27,100 Northwestern Blvd. in Las Vegas, NV. Firm is known as "Big Blue."



Scope



103	<ul style="list-style-type: none"> Discovery of current business processes affecting scope continues to be an issue challenging MVP, e.g. SEFA, COA structure, custom tables, etc. 	<ul style="list-style-type: none"> Due to the speed of which MVP is being implemented, necessary discovery was not performed. As the team plans Phase 2, discovery needs to be completed to include business transformation needs and the remaining items that were not completed as part of Phase 1. 	<ul style="list-style-type: none"> OPM agrees with this finding and is working with CGI to identify specific areas where data is needed and is not available. 	Monitor	**	H
91	<ul style="list-style-type: none"> The conversion plan is unclear and may not be complete in time for UAT. 	<ul style="list-style-type: none"> Jira should track all conversion activities. The conversion design also needs to be reviewed to ensure everyone (e.g. SCO, NDOT) agrees with the plan and data for go live. If there are manual conversions (e.g. AR and Budget) that agencies are responsible for, assignment of tasks, resources and delivery dates should be consistent with other project tracking in Jira. Plante Moran would like to review the conversion plan, tasks and the Jira ticket. 	<ul style="list-style-type: none"> OPM agrees with this finding that we require a conversion plan from CGI. 	Open	H	C
116	<ul style="list-style-type: none"> The interfaces necessary for NDOT to move data from Advantage 2 to Advantage 4 are not known and may not be designed and developed in time for go live. 	<ul style="list-style-type: none"> Assemble a small focused team to design and develop the interfaces to accommodate NDOT staying in Advantage 2 for the MVP of Financial. 	Recommendation already in progress - OCM/Comm and Training resource proposal to include added State resource support. Also, an upcoming CR from CGI will also be requested to add additional trainers for Phase 1B.	Open	*	H

* As item is an Issue, Probability is not applicable

**As item is an Action, Probability and Severity are N/A



Schedule



119	<ul style="list-style-type: none"> A recent discovery of an additional custom tables required for Financial reporting has impacted the scope of the project at a sensitive time. Discovery of the scope of custom table use and a plan to address in Adv 4x has not been completed 	<ul style="list-style-type: none"> A complete discovery of custom table use in Adv 2x should be completed to determine what custom tables are used and required for phase 1a MVP. Identify which resources can be redeployed to address the issue without impacting other critical workstreams. 	<ul style="list-style-type: none"> Tech Team Leadership will be researching this item. 		Open	*	H
89	<ul style="list-style-type: none"> CGI interface and conversion development and visibility continues to be a concern as it was identified in the EC to be lagging. 	<ul style="list-style-type: none"> Develop the cycle (e.g. daily, weekly, monthly) to be used for UAT and performance testing and ultimately deployment. The cycle needs to include the interfaces, data warehouse refresh, reports, and forms as well as jobs that will need to run. 	<ul style="list-style-type: none"> A full conversion schedule was presented to OPM by CGI. All of the data will be converted by the end of Sprint 4.4. With the exception of the Fixed Assets data, which will be converted by the end of Sprint 5.1. CGI has 11 interfaces to build and they have almost completed them. 		Open	*	H
48	<ul style="list-style-type: none"> Lack of a contingency plan (Risk) for the schedule for both Financial and HRM MVP. 	<ul style="list-style-type: none"> Suggest leadership determines the contingency of missing schedule. This includes a defined GO-NO GO decision plan. 	<ul style="list-style-type: none"> It is best practice to have a contingency plan. The State has decided to go live with the solution based on the timeline, not readiness. We agree that based on the State's decision, this item can be marked as an accepted risk. 		Monitor	C	C

* As item is an Issue, Probability is not applicable

**As item is an Action, Probability and Severity are N/A



Budget



124	<ul style="list-style-type: none"> Potential delays in Phase 1A (FIN) scope completion or Phase 1B (HRM) schedule may require additional budget allocations for project contractors. 	<ul style="list-style-type: none"> Begin discussions and planning with contractors to address contract contingencies based on expected scenarios. 	This is an understood risk. Communication is ongoing with vendors (like BerryDunn & Eide Bailly). As a result, we have Amendments in place, or in the works, to extend for time and/or time money.	Open		P r o b a b l e	H i g h

* As item is an Issue, Probability is not applicable

**As item is an Action, Probability and Severity are N/A



#	Observation	Recommendation	OPM Response	OPM Status	PM Status	Probability	Severity
125	<ul style="list-style-type: none"> The All Open Bugs Log is partially filled out but is missing critical information like Severity, Priority, and Closed dates. 	<ul style="list-style-type: none"> A formal design approval process should be established for report, interface and conversion development. The formal design should also inform the IUAT process and associated test scenarios. 	<ul style="list-style-type: none"> Creators of Jira items are frequently NOT THE BEST persons to be submitting the updates. For example, the Program Director frequently creates risks and/or issues for other resources in order to get them documented. The PM Governance Committee then follows up with the best resource to be providing the updates. 		Open	* *	* S
126	<ul style="list-style-type: none"> The plan for the team members to map security roles from Advantage 2 to Advantage 4 may need additional attention. Mapping A2 to A4 roles could result in (1) changes to functionality or role definition that accompany the upgrade and/or (2) errors in assigning roles that could result in a conflict (segregation of duties) that is not intended. It was indicated in a previous OPM response that a tech team member and a functional team member would be approving security roles in Advantage 4. It is best practice when configuring security roles to have an authoritative Finance resource approve roles. 	<ul style="list-style-type: none"> Security roles being configured in the system should be formally approved by the SCO and documented as part of the artifacts in the Project. This would also allow the SCO to identify if there are any previous role assignments in Advantage 2 that should be updated. 	<ul style="list-style-type: none"> All security roles have been created, including those for NDOT, and will be tested in EUAT during the next few weeks. 		Open	* *	**
101	<ul style="list-style-type: none"> The current project plan does not inform stakeholders of the overall health of the project as it does not utilize a consistent methodology and tools to present a complete picture of the required elements of resources, tasks, and schedule. 	<ul style="list-style-type: none"> Develop a project plan to include those items that can inform leadership and stakeholders of the status and trend of the overall project that is built on tracking completion of tasks. 	<ul style="list-style-type: none"> OPM and CGI are currently exploring a Jira/Project connection/plugin, CEPTAH Bridge, to provide a holistic view of the project. 		Monitor	P	H



Resources



106	<ul style="list-style-type: none"> The State is responsible for writing its test scripts and is struggling to identify the proper level of scripts to develop. Additionally, without a functioning system currently, it is difficult to develop and test scripts for UAT. This has been identified as a Risk in the project Risk Log. 	<ul style="list-style-type: none"> Develop and plan on how to support this activity, including defining the scope, resources, timing, and expectations for the resources. Scripts will be reviewed once completed. 	<ul style="list-style-type: none"> CGI has provided a resource to assist with the Advantage 4x knowledge gaps that State resources have. OPM is working to identify additional resources to assist with writing test scripts. 	Open	C	C
78	<ul style="list-style-type: none"> The MVP Phase 1A post-go-live support approach has not been finalized and communicated broadly to the CORE.NV project team. The technical staff are unaware of who will be the system "owner" and their role in the ongoing support and administration of the system, 	<ul style="list-style-type: none"> Establish a clear plan for post go-live support that addresses direct end user support (helpdesk) along with ongoing administration of the system. Determine and communicate the future role of the current OPM technical staff with respect to their long term involvement in the CORE.NV project. 	<ul style="list-style-type: none"> This is very similar to finding #58. OPM requests that Plante Moran please combine these findings. OPM is still working to finalize the plan in collaboration with the OCIO. 	Monitor	*	M
122	<ul style="list-style-type: none"> Completion of data warehouse requirements for go-live are at risk. The data warehouse team has 340 assigned story points to complete for Phase 1a, this includes 61 backlogged story points and 147 story points in "Review" status. The average velocity for the data warehouse work was 30 during the last PI. There is no documented plan for completion of the remaining working during the next PI increments. 	<ul style="list-style-type: none"> Identify a contingency plan to identify what is needed for MVP at go-live and focus on prioritizing the workstream based on impact and need. 	<ul style="list-style-type: none"> 1) All interfaces that the State Tech Team is responsible for, for Phase 1A, are now complete. The last PI's velocity for DW was particularly slow for several reasons : 1. Ramp-up & access issues. Access issues were not resolved until mid-August, leaving the first 2 weeks at almost zero velocity. 2. Several resources have been added in late PI4 which significantly increased velocity. Also note that the blockers are being cleared daily. At this writing there are 46 SP in the backlog and 98 SP in Code review. 	Open	H	C

* As item is an Issue, Probability is not applicable

**As item is an Action, Probability and Severity are N/A



Appendices



Legend for Observations & Recommendations



RISK PROBABILITY		
Label	Abbreviation	Description
Certainty	C	Risk will occur
High Probability	H	Risk is very likely to occur
Probable	P	Probable
Unlikely	U	Risk not expected to Occur
Remote	R	Risk extremely unlikely to occur
Critical	C	Critical/Devastating impact to the project that requires immediate attention and action
Significant	S	Critical/Devastating impact to the project that requires immediate attention and action
High	H	Considerable impact to project that needs prioritized attention
Medium	M	Moderate impact on project but without high priority
Low	L	Minimal impact on project that may be acceptable without extensive mitigation efforts



RAID Approach



Risk Log	Risks are events that may occur over the course of the project that could have adverse or detrimental effect on overall success
Action Log	Actions are the things that need to be done throughout the duration of the project and should be communicated to stakeholders
Issue Log	An issue is an unexpected event happening in the present moment with a potential negative impact on reaching goals
Decision Log	Decisions that need to be made over the course of the project should be communicated with stakeholders and memorized

L = Low	Item is less important at this time
M = Medium	Item is usually necessary but are not the most important item at present
H = High	Items is critical to address currently

L = Low	Item will not materially affect the usability of the system
M = Medium	Item may impact some portion of the usability of the system but not the overall ability to go live
H = High	Item may impact the ability to go live if not mitigated



Project Health Assessment Rubric



Project Health Status Categorizations

Project Health Assessment Area	Green	Amber or Yellow	Red
Scope:	<p>All criteria below are being met:</p> <ul style="list-style-type: none"> The scope is well-defined. The scope has not been changed outside of the original scope definition or any scope changes made are not expected to impact the current overall schedule or budget. <p><i>If scope re-baselining has occurred, status may return to this categorization—provided that the above criteria is met for the re-baselined scope.</i></p>	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are one or more areas of scope that have yet to be fully defined, but they are not expected to impact the current overall schedule and/or budget. The scope has not been changed outside of the original scope definition or any scope changes made are expected to have no, or minimal, impact to the current overall schedule or budget, and will not impact the critical path. 	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are areas of scope that have yet to be fully defined, and these unknowns are expected to impact the current overall schedule and/or budget. The scope has been changed outside of the original scope definition and any such scope changes are expected to impact the current overall schedule or budget and/or critical path.
Schedule:	<p>All criteria below are being met:</p> <ul style="list-style-type: none"> The schedule and critical path are well-defined. The schedule is progressing as planned, with all critical path milestones and deadlines being met. <p><i>If schedule re-baselining has occurred, status may return to this categorization—provided that the above criteria is met for the re-baselined schedule.</i></p>	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are areas of the schedule that have yet to be fully defined, but the critical path is well-defined. The schedule is not progressing as planned but, all critical path milestones and deadlines are currently being met and are expected to continue to be met. 	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are areas of the critical path schedule that have yet to be fully defined. The schedule is not progressing as planned and critical path milestones and deadlines are not being met and/or are expected to not be met.
Cost:	<p>All criteria below are being met:</p> <ul style="list-style-type: none"> The budget is well-defined. Budget funds have been allocated as needed. The budget is being expended as required. <p><i>If budget re-baselining has occurred, status may return to this categorization—provided that the above criteria is met for the re-baselined budget.</i></p>	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are areas of the budget that have yet to be fully defined, but estimated funds that will be needed are available. Funds needed are exceeding originally budgeted funds and it is impacting the current overall schedule but, not the critical path. The short-term budget is being over-expended but, spending is expected to remain within the overall long-term budget. 	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are areas of the budget that have yet to be fully defined and estimated funds needed are not expected to be available. Budget funds are not being allocated as needed and this is impacting the critical path. The budget is being over-expended per the original planned budget and spending is expected to exceed the overall budget (including any contingency funds).
Resources:	<p>All criteria below are being met:</p> <ul style="list-style-type: none"> All needed resources have been identified. All identified resources have been allocated. There are no overallocated resources. 	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are needed resources that have yet to be fully identified, but it is not expected to impact the current overall schedule and/or budget. There are identified resources that have yet to be allocated, but they are not expected to impact the current overall schedule and/or budget. There are resources that are overallocated, but these are not expected to impact the current overall schedule and/or budget. 	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are needed resources that have yet to be fully identified and this is impacting, or is expected to impact, the current overall schedule and/or budget. There are identified resources that have yet to be allocated and they are impacting, or are expected to impact, the current overall schedule and/or budget. There are allocated resources that are overallocated and it is impacting, or is expected to impact, the current overall schedule and/or budget.



Thank you

CELEBRATE THE JOURNEY
1998: Named for the first time to Fortune magazine's list of "100 Best Companies to Work For."

1990: Plante Moran Financial Advisors registers with the SEC.

1996: Plante Moran CRESA is formed.

1996: PSM Corporate Finance LLC (PMCF) is founded.

1995: Firm creates domain and later launches website.

1995: Member of World's Most Substantiated "100 Most Influential Advisors" list in "B2B".



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



2003: Firm forms Diversity Council.

2003: First international office in Shanghai, China.



2007: Plante & Moran launches.

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

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