



Manitoba Public Insurance

Board of Directors Meeting

Meeting Date: September 27, 2018

Agenda Item: 5.3

Subject: High School Driver
Education Project

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RECOMMENDATION

That the Members approve the revised budget for the High School Driver Education Project (Driver Z) to \$7.1 million.

That the Members approve no change to the \$50 enrollment fee for the new Driver Z program at this time.

BACKGROUND

Project Scope and Budget

Initial Board approved budget for the project was \$5M with the finalization of the FY17/18 Capital Budget. Over the past two years, Management reduced the budget to \$4M and later restored it to \$5M following the completed business vision, associated estimates and timeline for completion of the project to the end of Phase 3. In April 2018, Board approved a revised budget of \$5M and a project extension from fall 2018 to spring 2019.

The current project ends with a complete Driver Z product and people readiness plan but does not include product piloting or implementation costs. Management believes these activities are critical to success of the project, should be reconsidered as in-scope and budgeted through the project where they are incremental costs.

The proposed Driver Z operational pilot (Phase 4) will commence in May, 2019 involving limited classes across Manitoba. The pilot experience will enable a well-tested product and experience prior to full implementation in November, 2019 and provide opportunity for modification prior to province-wide release. It should be noted that students who begin the Driver Z pilot in May, 2019 are eligible for their first road test attempt 11 months later in March, 2020. Pilot and full implementation will overlap for several months. Implementation also includes temporary operational human resources to support the instructor community across Manitoba, equipment for the instructors, student incentives, a marketing strategy, a new customer support model, and training for the broader stakeholder community (brokers, front line staff) and project support through the first two months of full implementation.

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The Corporate Value Management Office completed a detailed review of the project business case including these additional costs, and the forecasted long-term annualized claims savings of \$1.36M is deemed achievable and the business case has a negative NPV of (\$1.6M), IRR of 2.4% and discounted payback period of 18.7 years with FY14/15 being year 1. This NPV does not include the internal MPI employee costs of \$2M to develop this project.

Driver Z Vision & Modification

The approved curriculum vision included telematic and instructor-observed assessment information and feedback loop to students and co-pilots. The proof of concept exercise provided evidence that the telematics provided some marginal gains in learning outcomes; however, sample size limited the level of confidence in that finding. As the project has progressed and component elements estimated, Management is not satisfied that the benefits of the telematics aspect of the vision for the Driver Z program outweigh the ongoing associated operational costs. The modified Driver Z vision includes instructor-observed in-car assessment delivered immediately after each lesson, directly through the Driver Z application to students and co-pilots. Management recommends further study and potential business case development for the use of evolving lower cost telematics solutions within the broader customer base for rate setting or premium discount purposes. If a business case demonstrates value, then it would be appropriate to reconsider the Driver Z program as a potential gateway to telematics use by customers and could be added to the program design in the future.

Enrollment Fees

In April, 2018 Management advanced the recommendation to increase the enrollment fee for participants from \$50 to \$100 and introduced in tandem with launch of Driver Z. Board Members requested further study to determine the impact on low income populations and determine if an increase would potentially become a barrier to program subscription.

The Corporation conducted a broad survey of past parental participants and focus groups discussions which provided further insight into the potential public response to fee increases. While the vast majority of respondents indicated that they felt the program is either affordable or very affordable, there is a small segment of the population who indicate the cost is either currently high or would become a barrier to entry if increased. While it is anticipated that most Manitobans would disapprove of a fee increase of any kind, a sizable

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number of respondents expressed concern that a fee increase would reduce provincial participation, which is not desired.

Management recommends maintaining the \$50 fee until such time that the new curriculum has proven its value in terms of student engagement, learning outcomes, and claims reduction while also not reducing or limiting enrollment due to new practice requirements and parental involvement. While risk to enrollment is considered minimal, it would be imprudent to overshadow the launch of the new program and/or negatively affect public buy-in with a simultaneous fee increase. If the new curriculum decreases enrollment even with the same \$50 fee, that is important to understand and measure for impact.

The business case is adjusted to assume no fee increase until 2024/25 at which time the fee increases to \$100.

Project Benefits

In addition to an improved customer experience, higher levels of student engagement, better testing outcomes, and reduced traffic convictions, a measurable financial benefit of a better prepared driver is a reduction in at-fault accidents and corresponding claims. An increase in supervised practice from 24 to 45 hours is estimated to decrease collision claim risk by two percent (2%) and is supported by other jurisdictions as an anticipated outcome for this project. Empirical data is not available to consistently estimate the impact that program aspects will have on claims risk at this time; however the incorporation of more practice to achieve mastery and intensified focus on hazard perception and response has the potential to extend claims benefits further. It is reasonable that a hypothetical 5% improvement in claims could be achieved as an optimistic target.

A 2% improvement to the three year average at-fault rate of claims for 15-24 year old drivers would equate to \$1.36M annual claims avoidance but this will not be fully achieved until 2030 when the 15-24 year age cohort is fully populated with Driver Z students (estimated \$3.38M/year claims avoidance for 5% optimistic target). The benefits stream is incrementally achieved with each new graduating class of Driver Z students over the next 12 years.

The Corporation can currently compare claims, conviction, and driver testing data for novice drivers who participate in High School Driver Education and those who do not. Within two-three years of project implementation, the first cohort of Driver Z graduates will have achieved enough driving history to

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determine if the program is producing anticipated outcomes for new drivers within the Graduated Driver Licence program and if it is likely to deliver the long term benefits estimated within the business case.



CHANGE REQUEST

CR-001-INFA Upgrade Scope Increase

Project Name:	Informatica Upgrade	Project Number:	2770
Project Manager:	Doug Waldron	Issue Date:	2018-06-07
CR Initiator:	Doug Waldron	Response Date:	2018-07-04
CR Name: CR-001-INFA Upgrade – Scope Increase			
Reason for Change (trigger):			
CR to expand scope to include Windows Hosts and SQL Server upgrade to [REDACTED] Request to explore sharing testing resources and implementation weekends with \$U upgrade and Power Builder upgrade.			
Description of Change:			
Project schedule to be paused until prerequisites are resolved.			
Prerequisites to start DEV upgrade are:			
<ul style="list-style-type: none"> Informatica delivers version [REDACTED] HF1 with Windows [REDACTED] support in July. Vitality SRF for Windows [REDACTED] hosts and [REDACTED] SQL Server submitted in June. IBM starts delivering on SRF in August. 			
Prerequisites to start SIT/UAT upgrade are:			
<ul style="list-style-type: none"> DEV upgrade is complete IBM delivers [REDACTED] SIT/UAT servers Decision on joint \$U and/or PB testing has been made 			
Prerequisites to start PROD/ProdSupp upgrade are –			
<ul style="list-style-type: none"> UAT upgrade is complete Decision on joint \$U and/or PB implementation has been made 			
We may issue a series of CRs based on when prerequisites become known. Each upgrade phase can start when its prerequisites are met.			
Impact on Project (Schedule, Staff, Cost, Material, Company and Project):			



CHANGE REQUEST

CR-001-INFA Upgrade Scope Increase

BUDGET

Informatica Upgrade and approved budget is \$61,200.00 with an estimated duration of 3 months, 4 as a result of the learning curve for a Senior IT Analyst.

Original estimated cost of project after 4 months without any server upgrade = \$102,875.00

It was recommended that Informatica perform vitality server upgrades to align with the informatica upgrades (DR001) which may extend the project to Feb 2019 depending on decision of joint \$U and/or PB testing.

The extra effort to include server upgrades is detailed below.

Resource	Role	Effort	Est Days	Internal(\$75 * 6.25)/ External (\$125 * 8)	Cost
[REDACTED]	Project Lead	Plan the upgrade	18	External	18,000
[REDACTED]	Project Analyst	Maintain project plan and deliverables	10	External	10,000
[REDACTED]	Upgrade technician	Execute the upgrade	43	External	43,000
[REDACTED]	Project Oversight	Review plan and progress	5	Internal	2343.75
[REDACTED]	Mentor	She did the last upgrade and may have some insight into undocumented issues	10	Internal	4687.5
IC TEam	Testers	Exercise Informatica	5	50% Internal/ 50% External	3,672
App SME	Testers	Exercise Informatica	5	50% Internal/ 50% External	1,172



CHANGE REQUEST

CR-001-INFA Upgrade Scope Increase

Architecture	Environment coordinator	Work with other projects to free up the servers for upgrade	7	Internal	3281.25
DBA	Database administrator	Respond to any DB issues	7	Internal	3281.25
██████████	Technical Architect	SRF creation and testing assistance	15	External	15,000
Extra cost to include server upgrades					104,438
Adjustment to Original Estimate					102,875
New Total Cost					207,313
<p>The total cost of delivery is estimated at \$207,313.</p> <p>SCHEDULE: After approval of CR the schedule will extend to Feb 28, 2019 assuming collaboration of joint \$U and/or PB testing. The project will make every effort to complete as sooner.</p>					
Impact on Information Security					
No change					
Steps to be Taken After Approval:					
Track each prerequisite as a risk					



CHANGE REQUEST

CR-001-INFA Upgrade Scope Increase

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CHANGE REQUEST

CR-001-INFA Upgrade Scope Increase

Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, Information Technology	Date:	
Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:	Jonathan Yakel	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, ESS	Date:	
Name:		Signature:	<i>See SharePoint Workflow</i>
Role:		Date:	
Name:		Signature:	<i>See SharePoint Workflow</i>
Role:		Date:	

- No further approvals are required beyond Corporate Business Architect
- VP Business Sponsor(s) approval is required



CHANGE REQUEST

CR-001-INFA Upgrade Scope Increase

VP Business Sponsor Approval (If applicable)			
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Loss Prevention & Communications Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP IT & Business Transformation & Chief Information Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Customer Service & Chief Operating Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Finance & Chief Financial Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP People & Product Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: Signature: Date:		



CHANGE REQUEST

CR #: CR-STU-001 Consolidated Storage Projects

Project Name: SAN / TSM Upgrade (2785)	Project Number: 2785
Project Manager: Jim Goddard	Issue Date: 9/Aug/2018
CR Initiator: Jim Goddard	Response Date: 16/Aug/2018
CR Name: CR-STU-001 Consolidated Storage Projects	
Reason for Change (trigger):	
<p>This CR is to consolidate the SAN / TSM Upgrade (2785) and the File Server Storage Solution (2783) projects into a single project called “Infrastructure Risk Management-2018” using project code 2785. The SAN / TSM Upgrade and the File Server Storage Solution project have hard dependencies and the IBM costs and savings are based on both projects.</p> <p>This CR will also cover:</p> <ul style="list-style-type: none"> • The extension of the project end date • Updated project costs based on: <ul style="list-style-type: none"> ○ IBM RFSs received ○ On-going support cost for the Storage infrastructure as negotiated by Vendor Management ○ Revised MPI resource costs. 	
Description of Change:	



CHANGE REQUEST

CR #: CR-STU-001 Consolidated Storage Projects

Project Consolidation:

The SAN / TSM Upgrade and the File Server Storage Solution projects are interrelated, we cannot complete the TSM upgrade without components of the File Server Storage Solution being delivered and the File Server Storage Solution is dependent upon the storage platforms and software of the SAN / TSM Upgrade.

The IBM costs and savings are based on all components of the SAN / TSM Upgrade and File Server Storage Solution being implemented as a single entity.

We need a single project with a single project plan for the successful delivery of the components identified in the SAN / TSM Upgrade and File Server Storage Solution business case.

The File Server Storage Solution (2783) project will be merged with the SAN / TSM Upgrade (2785) project, including scope, deliverables and budget and renamed “**Infrastructure Risk Management-2018**” using project code 2785.

Extension of Project End Date:

The original project end date was December 31, 2018. This was based on MPI receiving RFSs from IBM in April 2018. The RFSs were not delivered until July 23, 2018 and will be approved by MPI and IBM in August 2018. Hence the new project end date will be April 30, 2019. Costs for March and April 2019 will part of the fiscal 2019-2020 budget.

Updated Project Costs:

The inserted workbook, based on the business case workbook, includes

- One-time costs from the 3 RFSs for this project received from IBM, RFS 097 Storage, RFS 098 Backup and RFS 070 File/Media Storage
- Reduction in the IBM Storage on-going support cost as negotiated by Vendor Management
- Revised MPI resource costs to support the clarified project deliverables and extended end date.



SAN_TSM Upgrade
Financial Budget Pr

Impact on Project (Schedule, Staff, Cost, Material, Company and Project):

Schedule: extend project end date from December 31, 2018 to April 30, 2019

Costs: Over the original 5 year business case there is an increase of one-time project costs and a reduction of on-going support costs.

	Business Case	CR for 2018/19	CR for 2019/2020	CR Total
MPI Resources	\$176,729	\$482,667	91,310	\$573,976
IBM One-time costs	\$1,207,500	\$1,432,314	42,063	\$1,474,377
On-going cost saving over 5 yrs	\$2,438,656	\$4,306,131	0	\$4,306,131
TOTAL	(\$1,054,427)	(\$2,391,150)	\$133,373	(\$2,257,778)



CHANGE REQUEST

CR #: CR-STU-001 Consolidated Storage Projects

Impact on Information Security
None
Steps to be Taken After Approval:
<ul style="list-style-type: none">• Complete Project Plan• Project Implementation

Note: If there are financial implications in the CR, it must be reviewed and approved by the Director of Enterprise Portfolio Management Services prior to seeking any approvals.

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CHANGE REQUEST

CR #: CR-STU-001 Consolidated Storage Projects

AUTHORIZATION

Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, Information Technology	Date:	
Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:	John Krupinski	Signature:	<i>See SharePoint Workflow</i>
Role:	Manager Budgeting	Date:	

- No further approvals are required beyond Corporate Business Architect
- VP Business Sponsor(s) approval is required



CHANGE REQUEST

CR #: CR-STU-001 Consolidated Storage Projects

VP Business Sponsor Approval (If applicable)			
Status: (A)pproved (R)ejected <i>(Please circle one)</i>	Name: Role: VP IT & Business Transformation & Chief Information Officer	Signature:	Date:
Status: (A)pproved (R)ejected <i>(Please circle one)</i>	Name:	Signature:	Date:
Status: (A)pproved (R)ejected <i>(Please circle one)</i>	Name:	Signature:	Date:



CHANGE REQUEST

CR #: CR-001-WSV

Project Name:	Windows Server Vitality [REDACTED]	Project Number:	2786
Project Manager:	Joey Bruneau	Issue Date:	31/July/2018
CR Initiator:	Joey Bruneau	Response Date:	15/Aug/2018
CR Name: CR-001-WSV WinSQL Forecast Increase			
Reason for Change (trigger):			
<p>The blended rate used for external resources on the project is too low (\$125) in comparison to the actual costs charged by the three consultants on the project (PM, Technical Architect, Program Director) causing larger discrepancies between the estimated and actual costs.</p> <p>The project is requesting approval of the new blended rates and project forecast of an increase of \$224,991.</p>			
Description of Change:			
<p>Finance would adjust the blended rate for external resources from \$125 to \$155 per hour, the MPI Internal Resources Incremental rate, for the one DBA, from \$75 to \$41 per hour, and the MPI OT rate from \$75 to \$62 per hour to better reflect the actual costs incurred.</p>			
Impact on Project (Schedule, Staff, Cost, Material, Company and Project):			
<p>The project budget has been impacted as follows:</p> <p>Project Plan approved forecast: \$336,852 New project forecast: \$389,991 Variance from Project Plan: \$53,139</p> <p>Budget Change History Original project budget: \$165,000 Project Plan approved forecast: \$336,852 Original variance: \$171,852 New project forecast: \$389,991 New variance from Project Plan: \$53,139 Total variance from original project budget: \$224,991</p>			
Impact on Information Security			
n/a			
Steps to be Taken After Approval:			
Proceed with using the new rates moving forward.			

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**Manitoba
Public Insurance**

CHANGE REQUEST

CR #: CR-001-WSV

Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, IT	Date:	
Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:	Bruce Kisell	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, Program	Date:	
Name:	John Krupinski	Signature:	<i>See SharePoint Workflow</i>
Role:	Manager, Budgeting	Date:	

No further approvals are required beyond Corporate Business Architect

VP Business Sponsor(s) approval is required



CHANGE REQUEST

CR #: CR-001-WSV

VP Business Sponsor Approval (If applicable)			
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Loss Prevention & Communications Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP IT & Business Transformation & Chief Information Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Customer Service & Chief Operating Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Finance & Chief Financial Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP People & Product Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: Signature: Date:		



CHANGE REQUEST

CR #: CR-INFA-002 Consolidated Upgrade Projects

Project Name: Informatica Upgrade	Project Number: 2770
Project Manager: Doug Waldron	Issue Date: 16/Aug/2018
CR Initiator: Doug Waldron	Response Date: 23/Aug/2018
CR Name: CR-INFA-002 Consolidated Upgraded Projects	
Reason for Change (trigger):	
<p>This CR is to consolidate the Dollar Universe Upgrade (2775) project with the Informatica Upgrade (2770) project into a single project and budget called “Informatica and \$U Upgrade” (2770). We will use 2770 and cancel project code 2775.</p> <p>The Informatica Upgrade has hard dependencies with the Dollar Universe Upgrade and the testing and implementation timelines are already aligned with both projects, along with most of the assigned resources for both teams. Combining these projects will provide tighter controls for delivering both projects while minimizing the administrative effort required to complete delivery and financial reporting.</p> <p>This CR will also cover:</p> <ul style="list-style-type: none"> • Consolidated project budget • The recognition of the existing approved project delivery milestones from \$U upgrade (grandfathered clause) 	
Description of Change:	
<p>Project Consolidation: The Informatica Upgrade has hard dependencies with Dollar Universe Upgrade and the testing and implementation timelines must be aligned between both projects. Project resources and budgets for both projects are allocated, they will be consolidated and managed under the new project.</p>	
Impact on Project (Schedule, Staff, Cost, Material, Company and Project):	



CHANGE REQUEST

CR #: CR-INFA-002 Consolidated Upgrade Projects

Schedule: Projected end date is 2018-12-23.

Costs: No change, just moving \$U spending authority to 2770

	Spending Authority
2775 Dollar Universe Upgrade	\$30,450
2770 Informatica Upgrade	\$207,313
TOTAL	\$237,763

Staffing:

Name	2770 allocation	2775 allocation	combined
[REDACTED]	75%	15%	90%
[REDACTED]	5%	5%	10%
[REDACTED]	5%	45%	50%
[REDACTED]	5%	5%	10%

Impact on Information Security

None

Steps to be Taken After Approval:

- Move approved 2775 milestones and resource requests to 2770.
- Consolidate current project status, share point site and financial reports
- Decommission the 2775 SharePoint and PPM sites

Note: If there are financial implications in the CR, it must be reviewed and approved by the Director of Enterprise Portfolio Management Services prior to seeking any approvals.



CHANGE REQUEST

CR #: CR-INFA-002 Consolidated Upgrade Projects

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CHANGE REQUEST

CR #: CR-INFA-002 Consolidated Upgrade Projects

AUTHORIZATION

Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, Information Technology	Date:	
Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:	John Krupinski	Signature:	<i>See SharePoint Workflow</i>
Role:	Manager, Budgeting	Date:	

- No further approvals are required beyond Corporate Business Architect
- VP Business Sponsor(s) approval is required



CHANGE REQUEST

CR #: CR-INFA-002 Consolidated Upgrade Projects

VP Business Sponsor Approval (If applicable)			
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP IT & Business Transformation & Chief Information Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: Signature: Date:
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CHANGE REQUEST

CR #: CR-IRM-002

Project Name:	Infrastructure Risk Management	Project Number: 2785	Business Case Number: ITBT-2018-030
Project Manager:	Jim Goddard	Issue Date:	7/Feb/2019
CR Initiator:	Jim Goddard	Response Date:	15/Feb/2019
CR Name: CR-IRM-002 Project Extension			
Reason for Change (trigger):			
<p>The Infrastructure Risk Management Project (IRM) cannot be completed by April 30, 2019 and IBM has provided MPI with their new estimated end date for SAN Migration and Backup Migration, February 28, 2020.</p> <p>IBM is not able to provide an end date for the implementation of Ctera and File Server Migration at this time. This CR will assume that IBM will complete the implementation of Ctera and File Server Migration by February 28, 2020.</p> <p>This CR is to define the new end date for the project, change the SQL database backup scope and estimate MPI resource costs.</p> <p>Cost will be broken out for fiscal 2018/2019 and for fiscal 2019/2020.</p>			
Description of Change:			



CHANGE REQUEST

CR #: CR-IRM-002

Schedule

- IBM has estimated that they will complete the project by February 28, 2020 including:
 - Migration of current SAN to new SAN infrastructure
 - Migration of current backup solution to new backup infrastructure
 - Backup of [REDACTED] VMservers by Spectrum Protect Plus
 - Migration of archive tapes, those with a retention period over 31 days, to on-site object storage
 - Decommissioning of the old hardware
 - Project Close-out

SQL Database Backup Scope

IBM has determined that Spectrum Protect Plus for MS SQL Server will not meet the business needs of MPI. IBM has now proposed that MPI deploy Spectrum Protect for MS SQL Server for the backup and restore of MPI's SQL databases. It is not reasonable to assume this can be validated and implemented by the project end date and we are requesting approval to run a Proof of Concept (POC) including:

- Ensure Spectrum Protect for MS SQL Server meets all of MPI's business requirements, such as data masking, backups started by other processes, backups starting other processes, etc
- Based on the contract determine tasks MPI is performing and should be transitioned to IBM
- A RACI outlining MPI and IBM roles and responsibilities for a Spectrum Protect for MS SQL Server migration
- Identify the effort for both MPI and IBM to migrate all databases to use Spectrum Protect for MS SQL Server
- Collectively provide a recommendation if MPI/IBM should proceed with Spectrum Protect for SQL Server migration as a separate initiative.

Impact on Project (Schedule, Objectives, Benefits, Budget, Resources):



CHANGE REQUEST

CR #: CR-IRM-002

Benefits: Vendor Management has confirmed that the “Additional Monthly Savings” they negotiated with IBM started September 2018 and we will not spend the 15% contingency for IBM One-time and T&M costs

Budget:

There will be no additional IBM cost.

- The estimated budget for fiscal 2018/2019 is \$1,740,786
- The estimated budget for fiscal 2019/2020 is \$368,336

The budget increase due to the extension of the project is \$62,881

CR-STU-001 (approved)	Business Case	2018/2019	2019/2020	CR Total
MPI Resources	\$176,729	\$482,667	91,310	\$573,976
IBM costs	\$1,207,500	\$1,432,314	42,063	\$1,474,377
Project Costs	\$1,384,229	\$1,914,981	\$133,373	\$2,048,353

CR-IRM-002	Business Case	Fiscal 2018/2019*	Fiscal 2019/2020	Projected Total
MPI Resources	\$176,729	\$391,527	\$245,124	\$636,651
IBM costs	\$1,207,500	\$1,349,259	\$125,324	\$1,474,583
Project Costs	\$1,384,229	\$1,740,786	\$368,336	\$2,111,234

*Includes an IBM monthly on-going support cost of \$32,086 for 6 months

Resources: Resource estimate for fiscal 2019/2020

Role	Rate	Projected Hours 19/20	Projected Costs 19/20
PM - Contracted thru IBM	\$ 154.55	894	\$ 138,167.70
Application Architect - Contract	\$ 125.00	140	\$ 17,437.50
DBA Contractor	\$ 125.00	135	\$ 16,900.00
PCA - Contract	\$ 125.00	100	\$ 12,550.00
Program Manager - Contract	\$ 125.00	100	\$ 12,550.00
ApplServices EDMS		343	\$ -
ApplServices EDMS O/T	\$ 75.00	51	\$ 3,806.25
ApplServices AES		62	\$ -
ApplServices AES O/T	\$ 75.00	29	\$ 2,175.00
Application Services DLS		62	\$ -
Application Services DLS O/T	\$ 75.00	29	\$ 2,175.00



CHANGE REQUEST

CR #: CR-IRM-002

Application Services AOL - Contract	\$ 125.00	62	\$ 7,700.00
Application Services AOL O/T	\$ 125.00	32	\$ 4,000.00
ApplServices CARS - Contract	\$ 125.00	62	\$ 7,700.00
ApplServices CARS O/T	\$ 125.00	32	\$ 4,000.00
Application Services Finance - Contract	\$ 125.00	62	\$ 7,700.00
Application Services Finance O/T - Contract	\$ 125.00	40	\$ 5,000.00
Application Services IWS		62	\$ -
Application Services IWS O/T	\$ 75.00	44	\$ 3,262.50
DBA	\$ -	723	\$ -
ISO	\$ -	8	\$ -
Technical Architect	\$ -	242	\$ -
PTG	\$ -	76	\$ -
		3,388	\$ 245,123.95

Impact on Information Security

None

Steps to be Taken After Approval:



CHANGE REQUEST

CR #: CR-IRM-002

- IBM to install LAN connectivity to new hardware
- IBM to validate hardware installed
- Migration to SAN and Backup Solution
- MPI SAN / Backup Validation
- Proceed with Ctera implementation and file server migration

Note: If there are financial implications in the CR, it must be reviewed and approved by the Director of Enterprise Portfolio Management Services prior to seeking any approvals.

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CHANGE REQUEST

CR #: CR-IRM-002

AUTHORIZATION

Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, IT	Date:	
Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:	John Krupinski (<i>Budget ONLY</i>)	Signature:	<i>See SharePoint Workflow</i>
Role:	Manager, Budgets	Date:	
Name:		Signature:	<i>See SharePoint Workflow</i>
Role:		Date:	

- No further approvals are required beyond Corporate Business Architect
- VP Business Sponsor(s) approval is required



CHANGE REQUEST

CR #: CR-IRM-002

VP Business Sponsor Approval (If applicable)			
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Loss Prevention & Communications Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP IT & Business Transformation & Chief Information Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Customer Service & Chief Operating Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Finance & Chief Financial Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP People & Product Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: Signature: Date:		



DECISION REQUEST

CR #: CR006 – Extend Project End Date

Project Name:	Security Risk Management	Project Number:	2717																
Project Manager:	Bruce Kisell	Issue Date:	2/Feb/2018																
CR Initiator:	Bruce Kisell	Response Date:	9/Feb/2018																
CR Name: CR002 – Extend Project End Date																			
Reason for Decision (trigger):																			
<p>There were delays in initiating and approving the RFP to engage TITUS (the successful vendor) for Data Tagging and Classification. The RFP is in the final stages of approval, which required approximately 10 additional days resulting from additional reviews and the executive change. It is anticipated that the RFP will be approved by January 9th allowing us to engage the vendor. In addition, the key OCM resigned leaving a resource GAP</p> <p>Infrastructure will be ready by April 10th. The project has engaged a project manager and OCM to complete the pilot.</p> <p>TITUS can be on site by April 16, 2018 the project would extend to approximately June 1, 2018</p> <p>TITUS has provided a high level implementation schedule that extends 9 weeks</p> <table border="1"> <thead> <tr> <th>Task</th> <th>Timing</th> </tr> </thead> <tbody> <tr> <td>Alignment</td> <td>Week 1</td> </tr> <tr> <td>Readiness</td> <td>Week 1</td> </tr> <tr> <td>Analysis</td> <td>Week 1/2</td> </tr> <tr> <td>Design</td> <td>Week 2/3</td> </tr> <tr> <td>Implementation</td> <td>Week 3/4</td> </tr> <tr> <td>UAT and Pilot Testing</td> <td>Week 4-8</td> </tr> <tr> <td>Production of Pilot</td> <td>Week 9</td> </tr> </tbody> </table>				Task	Timing	Alignment	Week 1	Readiness	Week 1	Analysis	Week 1/2	Design	Week 2/3	Implementation	Week 3/4	UAT and Pilot Testing	Week 4-8	Production of Pilot	Week 9
Task	Timing																		
Alignment	Week 1																		
Readiness	Week 1																		
Analysis	Week 1/2																		
Design	Week 2/3																		
Implementation	Week 3/4																		
UAT and Pilot Testing	Week 4-8																		
Production of Pilot	Week 9																		
Description of Decision:																			
<p>Extend the project end date to April 30th to accommodate for all of the deliverables resulting from the TITUS engagement:</p> <ul style="list-style-type: none"> • Implementation and configuration in SIT and PROD • Training and education (KMS and End Users) • Completed Operational Support Model • Completed implementation strategy • Execute repeatale process to implement VM pilot • Warranty and Lessons Learned • Closure reports 																			
Impacts																			
<ul style="list-style-type: none"> • Project schedule and resources will extend to June, 2018 <ul style="list-style-type: none"> ○ Vendor (TITUS) T&M costs = \$40,000 ○ Backfill Costs: 40 Days x 50% x \$75.00 = \$12,525 ○ Contractor PM Costs: 62 Days x 50% x \$125.00 = \$31,000 • Resource availability for 2018/2019 projects may be impacted • Projects costs can carry over to TRM-2018 DLP if required 																			
Steps to be Taken After Approval:																			



DECISION REQUEST

CR #: CR006 – Extend Project End Date

- Engage TITUS and produce delivery schedule

Note: If there are financial implications in the DR, it must be reviewed and approved by the Director of Enterprise Portfolio Management Services prior to seeking any approvals.

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DECISION REQUEST

CR #: CR006 – Extend Project End Date

Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, IT	Date:	
Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Initiative Sponsor	Date:	
Name:	Colin McDonald	Signature:	<i>See SharePoint Workflow</i>
Role:	Information Security Office	Date:	

- No further approvals are required beyond Executive Director, Corporate Initiatives Sponsor
- VP Business Sponsor(s) approval is required



CHANGE REQUEST

CR #: CR-002-WSV

Project Name:	Windows Server Vitality [REDACTED]	Project Number:	2786																		
Project Manager:	Joey Bruneau	Issue Date:	20/Aug/2018																		
CR Initiator:	Joey Bruneau	Response Date:	24/Aug/2018																		
CR Name: CR-001-WSV WinSQL Licensing Service																					
Reason for Change (trigger):																					
<p>In order to support Power Designer [REDACTED], it has been discovered that the Flexnet (vendor: Flexera) licensing service requires to be upgraded. However, upon further analysis, MPI has two instances of Flexnet installed, providing licenses for different applications. MPI only has a license for one installation / instance of Flexnet.</p> <p>The project team has determined the best course of action is to replace Flexnet with SySAM [REDACTED] since we have a license to use the product. Currently, there is no other licensing server environment, other than Production, that runs the licensing service (Flexnet). Therefore, the deployment and testing of SySAM would be done in the Production environment. To mitigate risks associated with having only a Production deployment, SySAM will be installed and run in parallel with Flexnet until testing has completed and all users have been migrated successfully.</p> <p>The project team is requesting the addition of scope to the project and approval of the approach to replace Flexnet with SySAM on the current Production server.</p>																					
Description of Change:																					
<ol style="list-style-type: none"> 1. Install SySAM [REDACTED] on the Production server 2. Load either new licenses or transfer licenses from Flexnet into SySAM (this depends on what the vendor will allow for migration) 3. Test Power Designer [REDACTED] Power Designer [REDACTED] and PowerBuilder using SySAM with a pilot group 4. Migrate remaining users to use SySAM after successful testing 5. Disable Flexnet licensing service 6. After a warranty period, remove Flexnet licensing service from Production server 																					
Impact on Project (Schedule, Staff, Cost, Material, Company and Project):																					
<p>Scheduled end date of project: not affected Staff effort & cost:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Effort (hrs)</th> <th>Cost</th> </tr> </thead> <tbody> <tr> <td>[REDACTED]</td> <td>n/a</td> <td>(\$16,646)*</td> </tr> <tr> <td>[REDACTED]</td> <td>16</td> <td>\$2,480</td> </tr> <tr> <td>[REDACTED]</td> <td>24</td> <td>\$700</td> </tr> <tr> <td>[REDACTED]</td> <td>n/a</td> <td>\$0</td> </tr> <tr> <td>Total</td> <td>40</td> <td>(\$13,466)</td> </tr> </tbody> </table>				Name	Effort (hrs)	Cost	[REDACTED]	n/a	(\$16,646)*	[REDACTED]	16	\$2,480	[REDACTED]	24	\$700	[REDACTED]	n/a	\$0	Total	40	(\$13,466)
Name	Effort (hrs)	Cost																			
[REDACTED]	n/a	(\$16,646)*																			
[REDACTED]	16	\$2,480																			
[REDACTED]	24	\$700																			
[REDACTED]	n/a	\$0																			
Total	40	(\$13,466)																			
<p>*Note: Clinton's time is no longer being charged as an internal incremental cost to the project which easily covers the added costs to add this work to the project.</p>																					
Impact on Information Security																					
n/a																					
Steps to be Taken After Approval:																					
Update the schedule and execute the added scope of work.																					



CHANGE REQUEST

CR #: CR-002-WSV

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Name:	Lawrence Lazarko	Signature:	See SharePoint Workflow
Role:	Director, IT	Date:	
Name:	John Remillard	Signature:	See SharePoint Workflow
Role:	Corporate Business Architect	Date:	
Name:	Bruce Kisell	Signature:	See SharePoint Workflow
Role:	Director, Program	Date:	
Name:	Gary Dessler	Signature:	See SharePoint Workflow
Role:	Corporate System Architect	Date:	

No further approvals are required beyond Corporate Business Architect

VP Business Sponsor(s) approval is required



CHANGE REQUEST

CR #: CR-IRM-003

Project Name: Infrastructure Risk Management-2018	Project #: 2785	Business Case #: ITBT-2018-030
Project Manager: Jim Goddard	Issue Date:	17/May/2019
CR Initiator: Jim Goddard	Response Date:	27/May/2019
CR Name: CR-IRM-003 Consolidation Project CR's to Update Business Case		
Reason for Change (trigger):		
<p>The Business Cases for the SAN and TSM Tape Backup Upgrade (ITBT-2018-030) and the File Server Storage Solution (ITBT-2018-003) were not updated after project change requests CR-STU-001 and CR-IRM-002.</p> <p>Purpose of this change request:</p> <ol style="list-style-type: none"> 1. Consolidate the additional costs and extended project end dates that were approved in change requests CR-STU-001 and CR-IRM-002. 2. To update business case ITBT-2018-030 to include the File Server Storage Solution and all approved costs and the extended project end date. 3. To close business case ITBT-2018-003 File Server Storage Solution. 4. To change the name of the consolidated project to Infrastructure Risk Management – 2018. <p>CR-STU-001 did not clearly state the combined and incremental project costs. This CR will provide more clarity on the costs adjustments.</p>		
Description of Change:		



CHANGE REQUEST

CR #: CR-IRM-003

1. Consolidated Costs and Extended End Date

CR-STU-001:

The combined budget, from the business cases, for SAN / TSM Upgrade (2785) and the File Server Storage Solution (2783) is \$1,384,229.

The total incremental cost of CR-STU-001 is \$664,124.

Therefore the total funding for the project with the approval of CR-STU-001 is \$2,048,353.

	Business Case Budget SAN/TSM Upgrade	Business Case Budget File Server Upgrade	Combined Business Case Budget	Incremental Costs from CR-STU-001	TOTAL Combined Business Case and CR-STU-001
MPI Resources	\$78,546	\$98,183	\$176,729	\$397,247	\$573,976
IBM One time Cost	\$517,500	\$575,000	\$1,092,500	\$266,877	\$1,359,377
IBM On-going Cost		\$115,000	\$115,000		\$115,000
TOTAL	\$596,046	\$788,183	\$1,384,229	\$664,124	\$2,048,353

CR-STU-001 extended the project end date from February 28, 2018 to April 30, 2019.

CR-IRM-002:

The total incremental cost for CR-IRM-2018 is \$62,881

Hence the total funding for the project with the approval of CR-STU-001 is \$2,111,234.

	Business Case	CR-STU-001	CR-IRM-002	Projected Total
MPI Resources	\$176,729	\$573,976	\$62,675	\$636,651
IBM costs	\$1,207,500	\$1,474,377	\$206	\$1,474,583
TOTAL	\$1,384,229	\$2,048,353	\$368,336	\$2,111,234

CR-IRM-002 extended the project end date from April 30, 2019 to February 28, 2020.

2. Update and Rename Business Case ITBT-2018-030

Once CR-IRM-003 is approved, the business case ITBT-2018-030 will be updated to include the File Server Storage Solution, the approved project cost and the approved project end date. The project name will be updated from "IBM Infrastructure Refresh – Storage Area Network (SAN) Storage and Tivoli Storage Manager (TSM) Tape Backup Vitality" to "Infrastructure Risk Management – 2018" (note, this is point 4 in Reason For Change).

3. Close Business Case ITBT-2018-003

Once CR-IRM-003 is approved, the business case ITBT-2018-003, File Server Storage Solution will be closed.

Impact on Project (Schedule, Staff, Cost, Material, Company and Project):



CHANGE REQUEST

CR #: CR-IRM-003

None
Impact on Information Security
None
Steps to be Taken After Approval:
Update the business case for SAN / TSM Upgrade (ITBT-2018-030) and close the business case for File Server Storage Solution (ITBT-2018-003).

SENIOR MANAGEMENT AUTHORIZATION

Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Operational Business Champion (OBC)	Date:	

- No further approvals are required beyond Operational Business Champion (OBC)
- Executive Project Sponsor(s) approval is required

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CHANGE REQUEST

CR #: CR-INFA-004

Project Name:	Informatica & \$U Upgrade	Project Number: 2770	Business Case Number: ITBT-2018-001
Project Manager:	Doug Waldron	Issue Date:	19/Feb/2019
CR Initiator:	Wendy Rahnefeld	Response Date:	26/Feb./2019
CR Name: CR-INFA-004 – Extend Project End Date to Aug 16, 2019			
Reason for Change (trigger):			
This CR is to extend the project end date to August 16, 2019 due to the availability of parallel UAT environments. The expected release date will depend on the start date of UAT testing. The end date included time for Informatica [REDACTED] PROD warranty, and completion of the closure report.			
Description of Change:			
Phase 2 of Informatica [REDACTED] (supported beyond 2021 and certified for Win [REDACTED]) on Win [REDACTED] servers requires Informatica Phase 1 to be complete. Due to the need for parallel UAT environments for testing (Phase 1 & 2) both the DSR/AAN batch and the CARS/Lawson payment cycle using the same masked data availability on two UAT environments is pushing the Informatica release date out. The most likely window for Phase 1 is Depot [REDACTED] after May 12. TRM-Informatica Phase 2 UAT testing will be added to July 7 th as part of Depot [REDACTED]. Warranty and project close out reports and final review will need to be included in the extension. Project budget and resources to be extended, assuming the unspent portion of FY2018 budget can be used in FY2019.			
Impact on Project (Schedule, Objectives, Benefits, Budget, Resources):			



CHANGE REQUEST

CR #: CR-INFA-004

Schedule - Extend to August 16, 2019 to finish testing, implementation, warranty and close out reports.

Objectives: No change to project objectives – UAT requires two parallel environments to test old and new versions using the same masked data for all phases.

Benefits: Parallel old/new test runs of both the DSR/AAN batch (aka 18 step DSDATA batch) and the CARS/Lawson payment cycle needs to run. To be statistically accurate only 50 customers need to be tested to ensure any changes to behaviour between software versions will be exposed and resolved.

Budget: \$12,000.00

Staff - Extend resources to finalize clean-up, and outstanding issues after migrations. Project Manager to complete closure report, and post-implementation review.

Extension of Project Resources as follows:

[REDACTED]	extend at 10% to August 16, 2019
	extend at 10% to August 16, 2019
	extend at 5% it August 16, 2019

Impact on Information Security

Not applicable

Steps to be Taken After Approval:

Continue work on the project with expected completion date of August 16, 2019



CHANGE REQUEST

CR #: CR-INFA-004

Note: If there are financial implications in the CR, it must be reviewed and approved by the Director of Enterprise Portfolio Management Services prior to seeking any approvals.

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CHANGE REQUEST

CR #: CR-INFA-004

AUTHORIZATION

Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, IT	Date:	
Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:	John Krupinski	Signature:	<i>See SharePoint Workflow</i>
Role:	Manager, Budgeting	Date:	
Name:	Jonathan Yakel	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, ESS	Date:	

- No further approvals are required beyond Corporate Business Architect
- VP Business Sponsor(s) approval is required



CHANGE REQUEST

CR #: CR-INFA-004

VP Business Sponsor Approval (If applicable)			
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Loss Prevention & Communications Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP IT & Business Transformation & Chief Information Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Customer Service & Chief Operating Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Finance & Chief Financial Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP People & Product Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: Signature: Date:		



CHANGE REQUEST

CR-SRM-004

Project Name:	SRM Security Risk Management	Project Number:	2778
Project Manager:	Diane Langlois	Issue Date:	6Nov2018
CR Initiator:	Colin McDonald	Response Date:	10Nov2018
CR Name: CR-004-SRM – DLP Requires Resource to Augment ISO Resource			
Reason for Change (trigger):			
Due to resource constraints across the SRM Security Risk Management project the resource originally assigned to the DLP Roadmap is better served working on other components of the project. As such an additional resources required to be brought in to assist with the DLP Roadmap.			
Description of Change:			
Incremental costs to the project are required to include the services of a Process and Security Consultant: This cost will be 45 working days * 8 hours per day *\$200/hour = \$72,000			
Impact on Project (Schedule, Staff, Cost, Material, Company and Project):			
This will ensure that the deliverables meet Security and Business requirements and are completed by February 28, 2019			
Impact on Information Security			
n/a			
Steps to be Taken After Approval:			
Secure contract with consultant Ken Buechler			

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CHANGE REQUEST

CR_SRM_004

AUTHORIZATION

Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, IT	Date:	
Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:	Colin McDonald	Signature:	<i>See SharePoint Workflow</i>
Role:	Chief Information Security Officer	Date:	

- No further approvals are required beyond Corporate Business Architect
- VP Business Sponsor(s) approval is required



CHANGE REQUEST

CR_SRM_004

VP Business Sponsor Approval (If applicable)			
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Loss Prevention & Communications Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP IT & Business Transformation & Chief Information Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Customer Service & Chief Operating Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Finance & Chief Financial Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP People & Product Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: Signature: Date:		



CHANGE REQUEST

CR #: CR-004-WSV

Project Name:	Windows Server Vitality (2008 -> 2016)	Project Number:	2786												
Project Manager:	Joey Bruneau	Issue Date:	15/Nov/2018												
CR Initiator:	Joey Bruneau	Response Date:	22/Nov/2018												
CR Name: SnoPass Alternate Solution Implementation															
Reason for Change (trigger):															
<p>The Vitality project requires the upgrade of SQL Server that serves the MPIPartners' SnoPass Community website in order to meet its objective. However, the current SharePoint version running SnoPass doesn't support SQL Server 2012.</p> <p>The Vitality project has recently been given direction, as per DR-005-WSV, to include the implementation of a Secure File Transfer (SFT) solution for external partners to access and download the latest SnoPass PDF. This CR is to formalize that decision and document the change in scope of the project.</p>															
Description of Change:															
<p>Plan the SFT implementation Develop new process/procedure to be shared with external partners Develop and test new SFT solution Document new SFT solution Deploy new SFT solution Communicate new SFT solution internally and to external partners</p>															
Impact on Project (Schedule, Staff, Cost, Material, Company and Project):															
<p>Schedule = overall project end date not affected Staff = 2 additional resources added to the project team - Consultant from the Application Services group and a BRM to interface with the external partner</p> <table border="1"> <thead> <tr> <th>Resource</th> <th>Effort</th> <th>Cost</th> </tr> </thead> <tbody> <tr> <td>Application Service Consultant</td> <td>60 hours</td> <td>\$7,500</td> </tr> <tr> <td>Business Analyst</td> <td>60 hours</td> <td>\$4,500</td> </tr> <tr> <td colspan="2" style="text-align: right;">Total</td> <td>\$12,000</td> </tr> </tbody> </table>				Resource	Effort	Cost	Application Service Consultant	60 hours	\$7,500	Business Analyst	60 hours	\$4,500	Total		\$12,000
Resource	Effort	Cost													
Application Service Consultant	60 hours	\$7,500													
Business Analyst	60 hours	\$4,500													
Total		\$12,000													
Impact on Information Security															
n/a															
Steps to be Taken After Approval:															
Socialize the change to the team and update project management documentation.															

Note: If there are financial implications in the CR, it must be reviewed and approved by the Director of Enterprise Portfolio Management Services prior to seeking any approvals.

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CHANGE REQUEST

CR #: CR-004-WSV

SENIOR MANAGEMENT AUTHORIZATION

Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, IT	Date:	

- No further approvals are required beyond the above
- Executive Project Sponsor(s) approval is required



CHANGE REQUEST

CR #: CR-INFA-005

Project Name:	Informatica & \$U Upgrade	Project Number: 2770	Business Case Number: ITBT-2018-001
Project Manager:	Doug Waldron	Issue Date:	13/Mar/2019
CR Initiator:	Wendy Rahnefeld	Response Date:	20/Mar/2019
CR Name: CR-INFA-005 – Extend Project End Date to July 26, 2019			
Reason for Change (trigger):			
This CR is to extend the project end date to July 26, 2019 due to the availability of parallel UAT environments. The expected release date will depend on the start date of UAT testing. The end date included time for Informatica [REDACTED] PROD warranty, and completion of the closure report.			
Description of Change:			
Phase 2 of Informatica [REDACTED] (supported beyond 2021 and certified for Win [REDACTED]) on Win [REDACTED] servers requires Informatica Phase 1 to be complete. Due to the need for parallel UAT environments for testing (Phase 1 & 2) both the DSR/AAN batch and the CARS/Lawson payment cycle using the same masked data availability on two UAT environments is pushing the Informatica release date out. The most likely window for Phase 1 is Depot 2019.3 after April 7th. TRM-Informatica Phase 2 UAT testing will be added to June 6th as part of Depot [REDACTED]. Warranty and project close out reports and final review will need to be included in the extension. Project budget and resources to be extended, assuming the unspent portion of FY2018 budget can be used in FY2019.			
Impact on Project (Schedule, Objectives, Benefits, Budget, Resources):			



CHANGE REQUEST

CR #: CR-INFA-005

Schedule - Extend to July 26, 2019 to finish testing, implementation, warranty and close out reports.

Objectives: No change to project objectives – UAT requires two parallel environments to test old and new versions using the same masked data for all phases.

Benefits: Parallel old/new test runs of both the DSR/AAN batch (aka 18 step DSDATA batch) and the CARS/Lawson payment cycle needs to run. To be statistically accurate only 50 customers need to be tested to ensure any changes to behaviour between software versions will be exposed and resolved.

Budget: \$8,000.00

Staff - Extend resources to finalize clean-up, and outstanding issues after migrations. Project Manager to complete closure report, and post-implementation review.

Extension of Project Resources as follows:

[REDACTED]	extend at 10% to July 26, 2019
	extend at 10% to July 26, 2019
	extend at 5% it July 26, 2019

Impact on Information Security

Not applicable

Steps to be Taken After Approval:

Continue work on the project with expected completion date of July 26, 2019



CHANGE REQUEST

CR #: CR-INFA-005

Note: If there are financial implications in the CR, it must be reviewed and approved by the Director of Enterprise Portfolio Management Services prior to seeking any approvals.

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CHANGE REQUEST

CR #: CR-INFA-005

AUTHORIZATION

Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, IT	Date:	
Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:	John Krupinski	Signature:	<i>See SharePoint Workflow</i>
Role:	Manager, Budgeting	Date:	
Name:	Jonathan Yakel	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, ESS	Date:	

- No further approvals are required beyond Corporate Business Architect
- VP Business Sponsor(s) approval is required



CHANGE REQUEST

CR #: CR-INFA-005

VP Business Sponsor Approval (If applicable)			
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Loss Prevention & Communications Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP IT & Business Transformation & Chief Information Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Customer Service & Chief Operating Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Finance & Chief Financial Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP People & Product Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: Signature: Date:		



CHANGE REQUEST

CR #: CR-006-WSV

Project Name:	Windows Server Vitality [REDACTED]	Project Number:	2786
Project Manager:	Joey Bruneau	Issue Date:	01/Apr/2019
CR Initiator:	Joey Bruneau	Response Date:	05/Apr/2019
CR Name: Project Extension for SharePoint Implementation			
Reason for Change (trigger):			
As per DR-007-WSV option #2, the project team implemented SharePoint on March 31, 2019. The project still has the failover testing to troubleshoot, fix, and test. This change request is to formalize the approval of the project extension to be adjusted to April 30 th , 2019 to complete the failover activities and close out the project.			
Description of Change:			
Reschedule and perform failover testing.			
Impact on Project (Schedule, Staff, Cost, Material, Company and Project):			
Schedule: one month added to the project end date; 90 man hours Staff: 4 resources (Technical Architect, DBA, SharePoint SME, Project Manager) require one month extension on project Cost: \$14,000 Original project budget: \$165,000 Current Forecast (CF): \$334,000 CF + CR-006 cost = \$358,000			
Impact on Information Security			
None			
Steps to be Taken After Approval:			
Update schedule. Advise stakeholders and team of new timelines.			

Note: If there are financial implications in the CR, it must be reviewed and approved by the Director of Enterprise Portfolio Management Services prior to seeking any approvals.

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CHANGE REQUEST

CR #: CR-006-WSV

SENIOR MANAGEMENT AUTHORIZATION

Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Operational Business Champion (OBC), Director, IT	Date:	

- No further approvals are required beyond Operational Business Champion (OBC)
- Executive Project Sponsor(s) approval is required



CHANGE REQUEST

CR-007-SRM

Project Name:	SRM Security Risk Management	Project Number:	2778
Project Manager:	Diane Langlois	Issue Date:	29Jan2019
CR Initiator:	Colin McDonald	Response Date:	10Feb2019
CR Name: CR-007-SRM – Schedule and Budget			
Reason for Change (trigger):			
Due to resource delays and vendor delays several work packages will not meet the Feb 28 timeline for completion. Additionally, the overall project costs are being impacted by RFP/RFS costs and resource costs internal/external			
Description of Change:			
Project Costs are outlined below:			
<ul style="list-style-type: none"> • Original Budget: \$939,630 • Actuals to Dec: \$581,156 • Estimate to Feb 28,2019: \$421,047 • Estimates costs for March / April 2019: \$126,000 • EAC: \$1,128,202 • Variance in budget: <u>\$188,572</u> 			
Workpackages Schedule affected are:			
<u>March 2019 Completion:</u>			
Pentest - to finalize process/procedures and communication once Pentest requirements identified by IBM – planned for end of February			
WAF - to finalize process/procedures and communication and provide warranty support. Delays due to IBM access to UAT and updates to non-prod identified			
<u>April 2019 Completion:</u>			
Forensics - RFP had no qualified responses. Vendor demos and selection delayed - processes and procedures cannot be documented until Vendor selected, tool configurations and deployment and end user training required to complete			
Impact on Project (Schedule, Staff, Cost, Material, Company and Project):			



CHANGE REQUEST

CR_SRM_002

Variance in original budget due to resources and vendor costs = \$188,572
Workpackages not complete by Feb 28:
Pentest and WAF completion for end of March
Forensics – completion for end of April
Impact on Information Security
n/a
Steps to be Taken After Approval:
Manage the project schedule to the completion dates. Manage the costs to the new approved budget Manage project closeout requirements

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CHANGE REQUEST

CR_SRM_002

AUTHORIZATION

Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, IT	Date:	
Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:	Colin McDonald	Signature:	<i>See SharePoint Workflow</i>
Role:	CISO	Date:	

- No further approvals are required beyond Corporate Business Architect
- VP Business Sponsor(s) approval is required



CHANGE REQUEST

CR_SRM_002

VP Business Sponsor Approval (If applicable)			
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Loss Prevention & Communications Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP IT & Business Transformation & Chief Information Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Customer Service & Chief Operating Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Finance & Chief Financial Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP People & Product Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: Signature: Date:		



CHANGE REQUEST

CR-008-SRM

Project Name:	SRM Security Risk Management	Project Number:	2778
Project Manager:	Joey Bruneau	Issue Date:	28-Mar-2019
CR Initiator:	Colin McDonald	Response Date:	04-Apr-2019
CR Name: CR-008-SRM – Forensics Redesign and Extension			
Reason for Change (trigger):			
After a review of the current forensic solution, it was determined there were additional ISO requirements that impact the equipment solution (VM and workstations) for forensic investigations. Further investigation is required to update the solution to satisfy the mandatory ISO requirements.			
Description of Change:			
The team is requesting an extension on the end date of the project to allow for further investigation, solutionizing, acquisition and implementation. The new target completion date is August 15 th . Once re-planning is completed, another CR will be created to approve the final forecasted cost of the project, including hardware acquisition costs.			
Impact on Project (Schedule, Staff, Cost, Material, Company and Project):			
The scheduled end date would be August 15 th , 2019. The additional costs for re-planning are based on the following effort estimates: PM (external) – 40 hours TA (external) – 80 hours ISO SME – 40 hours BA – 80 hours Resources: 120 x \$125/hr = \$15,000			
Impact on Information Security			
This change will allow the project to accommodate the additional requirements presented by the ISO.			
Steps to be Taken After Approval:			
Resource PM, BA and TA Update schedule and cost forecast Complete solutioning, submit additional CR for hardware costs, and hardware acquisition			

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CHANGE REQUEST

CR-008-SRM

AUTHORIZATION

Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, IT	Date:	
Name:	Gary Dessler	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate System Architect	Date:	
Name:	Colin McDonald	Signature:	<i>See SharePoint Workflow</i>
Role:	CISO	Date:	

- No further approvals are required beyond Corporate Business Architect
- VP Business Sponsor(s) approval is required



CHANGE REQUEST

CR-008-SRM

VP Business Sponsor Approval (If applicable)			
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Loss Prevention & Communications Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP IT & Business Transformation & Chief Information Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Customer Service & Chief Operating Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Finance & Chief Financial Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP People & Product Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: Signature: Date:		



CHANGE REQUEST

CR #: CR-009-SRM

Project Name: Security Risk Management - WAF	Project #: 2778	Business Case #: ITBT-2018-035
Project Manager: Joey Bruneau	Issue Date: 19/Mar/2019	
CR Initiator: Joey Bruneau	Response Date: 26/Mar/2019	
CR Name: WAF Project Extension		
Reason for Change (trigger):		
<p>This CR is related to the Web Application Firewall (WAF) project stream of the over-arching SRM project.</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED] Changes that are made in the test environment would need to be manually re-made in production, using a user interface that is different between the two software versions.</p> <p>[REDACTED] While the testing has been successful, there could be different behaviors in the production environment.</p>		
Description of Change:		
<p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p>		
Impact on Project (Schedule, Staff, Cost, Material, Company and Project):		
<p>The project end date would extend to May 31st, 2019.</p> <p>The addition project cost would be: 45 hrs x \$125 = \$5,625</p> <p>The project team would require to be extended until the end of May with the following effort estimates: Technical Architect and Analyst – 30 hours Project Manager – 15 hours - assuming external PM used</p>		



CHANGE REQUEST

CR #: CR-009-SRM

Impact on Information Security
n/a
Steps to be Taken After Approval:
Inform stakeholders of project extension. Readjust project schedule to align with new project end date.

Note: If there are financial implications in the CR, it must be reviewed and approved by the Director of Enterprise Portfolio Management Services prior to seeking any approvals.

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AUTHORIZATION

Name:	Lawrence Lazarko	Signature:	See SharePoint Workflow
Role:	Director, IT	Date:	
Name:	Colin McDonald	Signature:	See SharePoint Workflow
Role:	Corporate Information Security Officer	Date:	

- No further approvals are required beyond Operational Business Champion (OBC)
- Executive Project Sponsor(s) approval is required



CHANGE REQUEST

CR-010-SRM

Project Name:	Security Risk Management (SRM)	Project Number:	2778
Project Manager:	Joey Bruneau	Issue Date:	24-Apr-2019
CR Initiator:	Joey Bruneau	Response Date:	01-May-2019
CR Name: CR-010-SRM – HSDE Penetration Testing Overage Costs			
Reason for Change (trigger):			
<p>The SRM project created a new process for requesting and performing penetration tests. It used the HSDE project as one of its pilots to test the process. It was agreed on that the HSDE project would cover up to \$10,000 of the cost for the penetration testing. However, the costs exceeded that amount by \$4,699.</p> <p>This CR is to take into account the additional cost of the testing not covered by the HSDE project.</p>			
Description of Change:			
Adjust project's financial forecast to include the additional cost.			
Impact on Project (Schedule, Staff, Cost, Material, Company and Project):			
Original approved budget: \$939,630 Current financial forecast: \$1,148,827 Current forecast + CR-010-SRM: \$1,153,526			
Impact on Information Security			
none			
Steps to be Taken After Approval:			
Update financials			

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CHANGE REQUEST

CR-010-SRM

AUTHORIZATION

Name:	Lawrence Lazarko	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, IT	Date:	
Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:	Gary Dessler	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate System Architect	Date:	
Name:	Colin McDonald	Signature:	<i>See SharePoint Workflow</i>
Role:	CISO	Date:	

- No further approvals are required beyond Corporate Business Architect
- VP Business Sponsor(s) approval is required



CHANGE REQUEST

CR #: CR-011-SRM

Project Name: Security Risk Management - Forensics	Project #: 2778	Business Case #: ITBT-2018-035																					
Project Manager: Joey Bruneau	Issue Date: 13/Jun/2019																						
CR Initiator: Joey Bruneau	Response Date: 18/Jun/2019																						
CR Name: Forensics Schedule Change																							
Reason for Change (trigger):																							
Re-planning of the Forensics work stream has been completed. The project is requesting an extension on the end date and additional costs.																							
Description of Change:																							
The project has been re-planned with the following milestones.																							
<table border="1"> <thead> <tr> <th>Milestone</th> <th>Completion date</th> </tr> </thead> <tbody> <tr> <td>Software received</td> <td>10/Jul/2019</td> </tr> <tr> <td>Hardware received</td> <td>31/Jul/2019</td> </tr> <tr> <td>Hardware and software configured</td> <td>15/Aug/2019</td> </tr> <tr> <td>Testing complete</td> <td>25/Aug/2019</td> </tr> <tr> <td>Agents deployed</td> <td>25/Sep/2019</td> </tr> <tr> <td>Process/procedure documents complete</td> <td>6/Sep/2019</td> </tr> <tr> <td>Operational Support Model complete</td> <td>6/Sep/2019</td> </tr> <tr> <td>Warranty period complete</td> <td>10/Oct/2019</td> </tr> <tr> <td>Project closed</td> <td>15/Oct/2019</td> </tr> </tbody> </table>			Milestone	Completion date	Software received	10/Jul/2019	Hardware received	31/Jul/2019	Hardware and software configured	15/Aug/2019	Testing complete	25/Aug/2019	Agents deployed	25/Sep/2019	Process/procedure documents complete	6/Sep/2019	Operational Support Model complete	6/Sep/2019	Warranty period complete	10/Oct/2019	Project closed	15/Oct/2019	
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Process/procedure documents complete	6/Sep/2019																						
Operational Support Model complete	6/Sep/2019																						
Warranty period complete	10/Oct/2019																						
Project closed	15/Oct/2019																						
An external business analyst has been assigned to the project reducing the timeline but increasing the costs.																							
Impact on Project (Schedule, Staff, Cost, Material, Company and Project):																							
Project end date: October 15, 2019.																							
Costs: Business Analyst (external): ~\$30,000																							
<table border="1"> <thead> <tr> <th>Name</th> <th>Description</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Original Budget</td> <td>Original Budget</td> <td>939,630</td> </tr> <tr> <td>CR-007-SRM</td> <td>Schedule & Budget</td> <td>1,128,202</td> </tr> <tr> <td>CR-008-SRM</td> <td>Forensics Redesign and Extension</td> <td>1,143,202</td> </tr> <tr> <td>CR-009-SRM</td> <td>WAF Project Extension</td> <td>1,148,827</td> </tr> <tr> <td>CR-010-SRM</td> <td>HSDE Penetration Testing Overage Costs</td> <td>1,153,526</td> </tr> <tr> <td>CR-011-SRM</td> <td>Forensics Schedule Change</td> <td>1,185,000</td> </tr> </tbody> </table>			Name	Description	Total	Original Budget	Original Budget	939,630	CR-007-SRM	Schedule & Budget	1,128,202	CR-008-SRM	Forensics Redesign and Extension	1,143,202	CR-009-SRM	WAF Project Extension	1,148,827	CR-010-SRM	HSDE Penetration Testing Overage Costs	1,153,526	CR-011-SRM	Forensics Schedule Change	1,185,000
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CR-010-SRM	HSDE Penetration Testing Overage Costs	1,153,526																					
CR-011-SRM	Forensics Schedule Change	1,185,000																					
Impact on Information Security																							
Performing forensics analysis using the new system would be delayed.																							



CHANGE REQUEST

CR #: CR-009-SRM

Steps to be Taken After Approval:

Inform stakeholders of project extension.
Readjust project schedule to align with new project end date.

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AUTHORIZATION

Name:	Lawrence Lazarko	Signature:	See SharePoint Workflow
Role:	Director, IT	Date:	
Name:	Colin McDonald	Signature:	See SharePoint Workflow
Role:	Corporate Information Security Officer	Date:	

- No further approvals are required beyond Operational Business Champion (OBC)
- Executive Project Sponsor(s) approval is required



CHANGE REQUEST

CR #: CR-CCS-03

Project Name:	Credit Card Strategy	Project Number:	2452										
Project Manager:	Joanne Goss	Issue Date:	27/Nov/2018										
CR Initiator:	Raaj Chandra	Response Date:	29/ Nov/2018										
CR Name: Additional Budget request for phase-2 approach													
Reason for Change (trigger):													
<p>The original approved budget (\$1.7M) was a placeholder based on high level objectives and a limited understanding of project requirements. As the project has progressed, project requirements have been clarified and the effort to address known requirements has increased. As well, additional requirements have been clarified, and new solution components (e.g. tokenization) have been identified. As well, the cost of IBM services related to e-Commerce channel compliance were not included in the original budget.</p> <p>As a result of a better understanding of project requirements and the approach to addressing these requirements the project was re-estimated, and the revised costs were presented to Executive Committee and the Board. This Change Request serves to document the change to budget.</p>													
Description of Change:													
<p>Phase 1 of the project had the objective of achieving PCI compliance for the e-Commerce Channel by June 17, 2018. This was partially achieved, but cost more than expected due to the impact of IBM-related costs that had not been anticipated. The IBM costs as well as the MPI costs are included in the cost break down table below (Actuals till Oct 31st) in this PCR. All remaining Phase 1 work is being moved into the scope of Phase 2 and Operations team with Change Requests 4 and 5.</p> <p>Phase 2 of the project has the objective of achieving PCI compliance across all channels. To accomplish this, 23 work-streams of activity have been identified and described in Appendix A.</p> <p>The work effort and costs associated with addressing the above work streams was estimated in September 2018, and presented to the board. The primary reasons for the significant increase in the original budget are as follows:</p>													
<table border="1"> <tr> <td>IBM services costs for Phase 1 compliance not in original budget</td> <td>\$ 593,274.00</td> </tr> <tr> <td>Financing Agreement Solution (Including tokenization)</td> <td>\$3,401,137.00</td> </tr> <tr> <td>\$2,616,259 plus contingency \$784,878</td> <td>Plus 70,000 ongoing</td> </tr> <tr> <td>Additional work stream effort not previously identified</td> <td>\$ 105,000.00</td> </tr> <tr> <td>Total</td> <td>\$4,099,411.00</td> </tr> </table>		IBM services costs for Phase 1 compliance not in original budget	\$ 593,274.00	Financing Agreement Solution (Including tokenization)	\$3,401,137.00	\$2,616,259 plus contingency \$784,878	Plus 70,000 ongoing	Additional work stream effort not previously identified	\$ 105,000.00	Total	\$4,099,411.00		
IBM services costs for Phase 1 compliance not in original budget	\$ 593,274.00												
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\$2,616,259 plus contingency \$784,878	Plus 70,000 ongoing												
Additional work stream effort not previously identified	\$ 105,000.00												
Total	\$4,099,411.00												
Impact on Project (Schedule, Staff, Cost, Material, Company and Project):													



CHANGE REQUEST

CR #: CR-CCS-03

Currently the project budget is \$1.7M and the schedule to complete by December 2018. This CR requests an additional \$4.1M and based on MPI's objectives establishes the project end date as June 30, 2019. Formal approval of the tokenization solution from the province is pending, and that if this is not approved, budget and schedule will be impacted.

The cost breakdown is as follows:

	Financing Agreement Solution (Tokenization)	Other Workstreams	Total
Actuals as of October 31 (includes Phase 1 and Phase 2)			2.29M
Phase 2 Implementation forecast (Estimate to Complete)	1.79M	0.8M	2.59M
Contingency (30%)			0.98M
Total Estimate at Completion			5.8M

An *approximation* of the cost per work stream is shown in Appendix A. If work streams are removed or changed in the future, the cost impact may or may not match what is shown in Appendix A since i) some work streams contain an allocation of common costs that may not be removable, and ii) the removal of a work stream may result in changes to other work streams. Please note that the below work streams do not include contingency.

Impact on Information Security

This change request does not impact personal health information, financial or customer information. The project itself will impact the handling and processing of customer credit cards.

Steps to be Taken After Approval:

Continue refining project estimates and schedules for the 23 work streams, with the highest priority being the finalization of the estimates and schedule for the tokenization solution since this is likely the critical path of the project. If additional resources are required, they will be requested and added to the project.

Note: If there are financial implications in the CR, it must be reviewed and approved by the Director of Enterprise Portfolio Management Services prior to seeking any approvals.

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CHANGE REQUEST

CR #: CR-CCS-03

BTO AUTHORIZATION

Name:		Signature:	<i>See SharePoint Workflow</i>
Role:	Manager, EPMO	Date:	
Name:		Signature:	<i>See SharePoint Workflow</i>
Role:	Manager, Budgeting	Date:	
Name:		Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate System Architect	Date:	
Name:		Signature:	<i>See SharePoint Workflow</i>
Role:	Director, Project Delivery	Date:	



CHANGE REQUEST

CR #: CR-CCS-03

SENIOR MANAGEMENT AUTHORIZATION

Name:		Signature:	<i>See SharePoint Workflow</i>
Role:	Director, BTO	Date:	
Name:		Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:		Signature:	
Role:		Date:	

- No further approvals are required beyond Corporate Business Architect
- Executive Project Sponsor(s) approval is required



CHANGE REQUEST

CR #: CR-CCS-03

Executive Approval (If applicable)			
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Business Development & Communications & Chief Administrative Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP IT & Business Transformation & Chief Information Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Customer Service & Chief Operating Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Finance & Chief Financial Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Human Resources & Corporate Services & Chief Human Resources Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: Chief Actuary & Vice President, Product and Risk Management Signature: Date:		



CHANGE REQUEST

CR #: CR-CCS-03

Appendix A – Work Streams

Work Stream Name	Estimate
Moneris Agreement (Work stream 1)	No estimate (Resources are internal)
[REDACTED]	[REDACTED]
ASV Scan Remediation (Work stream 3)	
"Payment" Policy (Work stream 4)	\$38,400.00
Compliance Reporting (Work stream 5)	\$100,800.00
Tokenization (Work stream 6)	\$1,795,200.00
CEL (Work stream 7)	\$52,800.00
EDMS (Work stream 8)	\$67,200.00
Salvage (Workstream 9)	\$86,400.00
SharePoint (Workstream 10) (Part of workstream 17)	\$43,200.00
Email (Workstream 11)	\$67,200.00
Voice Recordings (Workstream 12)	\$52,800.00
POS Terminals (Workstream 13)	\$9,600.00
Referral Database (Workstream 14)	Not in estimate
Compliance Management Program (Workstream 15)	\$57,600.00
Business and Process (Workstream 16)	N/A (part of all estimates)
Subrogation (Workstream 17)	\$9,600.00
IRP (Workstream 18)	Not in estimate
Fax to Outlook (Workstream 19)	\$14,400.00
Post Mail (Workstream 20)	Not in estimate
VOIP Isolation (Workstream 21)	\$9,600.00
AOL Backup Deletion (Workstream 22)	Not in estimate
TTY (Workstream 23)	Not in estimate
	\$2,496,000.00



CHANGE REQUEST

CR #: CR-PS-01

Project Name:	Parts Solution	Project Number:	2808
Project Manager:	Mark Schalla	Issue Date:	15/05/18
CR Initiator:	Mark Schalla	Response Date:	01/06/18
CR Name: CR-PS-01 - Approve ESC Parts Solution budget			
Reason for Change (trigger):			
<p>On March 25th ESC made the decision to move forward with the Parts Solution project, project number 2808.</p> <p>The original budget approved by the board was \$500,000.</p> <p>ESC approved the project recommended approach and the associated budget of \$528,687 + \$103,423 (Software costs) = \$632,110.</p> <p>The delta from the original budget is \$632,110 - \$500,000 = \$132,110</p>			
Description of Change:			
<p>This CR covers the delta between the original Parts Solution 2018/19 budget and the ESC approved budget = \$132,110.</p>			
Impact on Project (Schedule, Staff, Cost, Material, Company and Project):			
<p>No impact on schedule, staff, material.</p> <p>Additional Cost: \$132,110 to be taken from PDR unallocated budget.</p>			
Impact on Information Security			
<p>Not affected.</p>			
Steps to be Taken After Approval:			
<p>Continue project as planned.</p>			

Note: If there are financial implications in the CR, it must be reviewed and approved by the Director of Enterprise Portfolio Management Services prior to seeking any approvals.

"This report has been prepared as advice, opinions, proposals, recommendations, analyses or policy options developed by or for the public body or a minister, as per Section 23(1) of the Freedom of Information and Protection of Privacy Act."



CHANGE REQUEST

CR #: CR-PS-01

BTO AUTHORIZATION

Name:	Ken Harkness	Signature:	<i>See SharePoint Workflow</i>
Role:	EPMO Officer, EPMO	Date:	
Name:	Dave Ruffeski	Signature:	<i>See SharePoint Workflow</i>
Role:	Manager, Business Services	Date:	
Name:	Gary Dessler	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate System Architect	Date:	
Name:	David Paradis	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, Project Delivery	Date:	



CHANGE REQUEST

CR #: CR-PS-01

SENIOR MANAGEMENT AUTHORIZATION

Name:	Ginette Johnston	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, BTO	Date:	
Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:	Shayon Mitra	Signature:	<i>See SharePoint Workflow</i>
Role:	Business Champion	Date:	

- No further approvals are required beyond Corporate Business Architect
- Executive Project Sponsor(s) approval is required



CHANGE REQUEST

CR #: CR-PS-01

Executive Approval (If applicable)			
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Business Development & Communications & Chief Administrative Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP IT & Business Transformation & Chief Information Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Customer Service & Chief Operating Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Finance & Chief Financial Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Human Resources & Chief Human Resources Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: Signature: Date:		



CHANGE REQUEST

CR-PS-03

Project Name:	Parts Solution	Project Number:	2808
Project Manager:	Chris Marko	Issue Date:	30/Oct/18
CR Initiator:	Chris Marko	Response Date:	9/Nov/18
CR Name: CR-PS-03 Project replanning and estimating due to additional scope and resourcing required.			
Reason for Change (trigger):			
<p>The approach is not just a simple out-of-the box implementation. The project is not changing the application, but adjusting MPI's business and processes to meet the requirements of the software. Our business rules need to be adapted and balanced between Car Part and MPI's rules.</p> <ol style="list-style-type: none"> 1. Scope: <ul style="list-style-type: none"> • Additional business artifacts to be completed as part of the project i.e. recycler engagement, recycler participation, workload time analysis. 2. Schedule: <ul style="list-style-type: none"> • Additional time required to close the business vision, close file review, parts business rules and policy documents. • Workload time analysis was not indentified • New target delivery date has shifted from December 31st to February 28th. 3. Resources <ul style="list-style-type: none"> • Additional business analysts, SME and system analyst added to the team to meet deliverables. <p>A business case will be developed specifically for the Parts Solution project. This initiative has been included in the overall PDR business case, but will be separated to monitor the specific costs and benefits for this project. Value Management has been engaged and we are working together to ensure we have the appropriate reporting to ensure we can quantify the savings from the parts sourcing solution. Savings will be attributed to staff (FTE) savings of 2.0 FTE at approximately \$100,000 per year and recycled part savings. The part savings can be the result of finding additional recycled parts increasing the recycled parts per claim or from a reduced price point for recycled parts increasing the savings per part.</p>			
Description of Change:			



CHANGE REQUEST

CR-PS-03

Identified work needs to be monitored, controlled, and delivered as per the project schedule:

Original Scope	Deliverables	% Complete	Original Target Date	Revised Date	Effort	Effort Remaining	Comments
Yes	Business Vision	100	15-Jun	4-Oct	24 days	0	Additional time required to pass peer review
Yes	Close File Review	100	29-Jun	28-Sep	71 days	0	Additional time required to complete
Yes	Business Policy Documents	64	16-Aug	5-Nov		15 days	Additional time required to pass business review
	Recycler Engagement	100	21-Jun	28-Sep	9 days	0	- Develop Strategy - Recycler Participation with CPP - Contact each recycler to identify any initial concerns with CPP
	Recycler Participation	100	27-Jun	1-Oct	14 days	0	-Investigate initial concerns -Meet with each recyclers to identify inventory practices
No	Estimator Work Load Time Analysis	100	14-Aug	5-Oct		0	-Performance testing to determine metrics and accept solution - Was not identified in schedule or effort determined.
Yes	Parts Business Rules	100	6-Jul	12-Oct	50 days	0	Additional time required to pass business review
Yes	Updated Estimating Standards	100		9-Nov	20 days		
Total Effort					248 days	20 days	
Additional Resources (see financial section for costs)							
Systems Analyst							
Operations SME							
Operations BA							
Project End Date:			30-Dec-2018	28-Feb-2019			

Impact on Project (Schedule, Staff, Cost, Material, Company and Project):



CHANGE REQUEST

CR-PS-03

- Project Schedule** – Project closure will shift 2 months from Dec 31/2018 to Feb 28/2019; we must meet the Depot Release entrance criteria by Nov 26, for the Depot Release to be completed by Jan 6 and to start the rollout waves 1 & 2, which are to be completed by Feb 28th. Project team would be participating in the 2 month rollout waves as part of implementation, warranty and project close.

Task Name	Start	Finish	Duration	% Complete
Inception Phase	5/11/2018	10/31/2018	24w 1d	78
Elaboration Phase	6/18/2018	11/15/2018	21w 4d	23
Build Phase	10/15/2018	11/29/2018	6w 4d	5
Testing Phase (SIT& E2E)	10/29/2018	11/28/2018	4w 3d	0
Depot Release (UAT)	11/29/2018	1/3/2019	5w 1d	0
Implementation – Go Live	1/3/2019	1/7/2019	3d	0
Roll out 1 (Warranty)	1/7/2019	2/1/2019	4w	0
Roll out 2 ((Warranty)	2/1/2019	2/28/2019	4w	0
Project Close	2/1/2019	2/28/2019	4	0

- Project Resources** – Allocations will need to be forecasted to Feb 28/2019; additional business resources have been assigned to project, to close critical path deliverables by Nov 15th.
- Project Budget** – Approval to spend additional funds for the over budget variance outlined.

Budget	Revised Approved Spend (CR-PS-01)	Spend to Date (as of Sep/18)	Estimated Cost to Complete Oct - Feb	Estimated 15% Contingency to Complete	Total Cost to Complete
500,000	632,110	298,241	\$480,948	75,505	\$854,694



CHANGE REQUEST

CR-PS-03

Details:

	CR-001 - Baseline			Actuals To-Date (Mar - Sep)			Est to Complete (Oct - Feb)		Variance - Baseline vs EAC	
	Resource	Effort	Cost	Resource	Effort	Cost	Effort	Cost	Effort	Cost
Business										
Business Architecture Lead	MPI	152	\$ 11,419	MPI - Inc	274	\$ 20,569	225	\$ 16,875	-347	\$ (26,025)
Business Analysts	Ext	1,200	\$ 150,045	Ext	837	\$ 116,343	1,142	\$ 158,738	-779	\$ (125,036)
Total Business		1,352	\$ 161,464		1,111	\$ 136,912	1,297	\$ 175,613	-1,126	\$ (151,061)
Technical										
Data Architect	External	168	\$ 21,000	Ext	14	\$ 1,911	82	\$ 11,454	72	\$ 7,635
Technical Architect	MPI	213	\$ -	MPI - NI	184	\$ -	112	\$ -	-83	\$ -
Technical Architect		0	\$ -	Ext	1	\$ 139	17	\$ 2,363	-18	\$ (2,502)
System Analyst				Ext		\$ -	84	\$ 11,676	-84	\$ (11,676)
Developer	Ext	126	\$ 15,750	MPI - NI	5	\$ -	100	\$ -	22	\$ 15,750
Integration Centre- 1	Ext	336	\$ 42,000	Ext	44	\$ 6,081	69	\$ 9,562	223	\$ 26,357
Integration Centre- 2	MPI - NI	76	\$ -	MPI - NI	20	\$ -	85	\$ -	-29	\$ -
Integration Centre- 3				MPI -Inc			45	\$ 3,371	-45	\$ (3,371)
Total Technical		919	\$ 78,750		267	\$ 8,132	594	\$ 38,425	58	\$ 32,194
UAT										
Test Coordinator	MPI - NI	152	\$ -	MPI - NI		\$ -	147	\$ -	5	\$ -
Senior SUA	MPI - NI	43	\$ -	MPI - NI		\$ -	80	\$ -	-37	\$ -
SUA	MPI - NI	217	\$ -	MPI - NI		\$ -	725	\$ -	-508	\$ -
QC&M Testing Analyst	MPI - NI	43	\$ -	MPI - NI		\$ -	0	\$ -	43	\$ -
Total QC&M (UAT)		457	\$ -		0	\$ -	952	\$ -	-495	\$ -
Change Services										
Change Lead	MPI - NI	460	\$ -	MPI - NI	0	\$ -	55	\$ -	405	\$ -
Change Lead				MPI - Inc	0	\$ -	206	\$ 15,415	-206	\$ (15,415)
Change Services		460	\$ -		0	\$ -	261	\$ 15,415	199	\$ (15,415)
KMS										
KMS - Technical CommOfficers	MPI - NI	350	\$ -	MPI - Inc	70	\$ 5,231	132	\$ 9,923	148	\$ (15,154)
KMS	Ext	100	\$ 12,537			\$ -		\$ -	100	\$ 12,537
KMS	MPI - NI			MPI - NI	30	\$ -	370	\$ -	-400	\$ -
Instructional Designer				MPI - Inc	18	\$ 1,369		\$ -	-18	\$ (1,369)
Total KMS		450	\$ 12,537		118	\$ 6,600	502	\$ 9,923	-170	\$ (3,986)



CHANGE REQUEST

CR-PS-03

	CR-001 - Baseline			Actuals To-Date (Mar - Sep)			Est to Complete (Oct - Feb)		Variance - Baseline vs EAC	
	Resource	Effort	Cost	Resource	Effort	Cost	Effort	Cost	Effort	Cost
Project Management										
Project Manager	Ext	504	\$ 63,000	Ext	745	\$ 103,611	412	\$ 57,268	92	\$ (97,879)
Program Manager	Ext	302	\$ 37,800	Ext	62	\$ 8,549	9	\$ 1,222	293	\$ 28,030
Project Control Analyst	Ext	67	\$ 8,400	Ext	47	\$ 6,533	132	\$ 18,404	-65	\$ (16,537)
Total Project Management		873	\$ 109,200		854	\$ 118,692	553	\$ 76,893	320	\$ (86,386)
Operational										
Business SME	MPI	936	\$ 70,225	MPI - Inc	586	\$ 43,969	817	\$ 61,256	119	\$ (35,000)
Business Analytics	MPI - NI	128	\$ -	MPI - NI		\$ -	145	\$ -	-17	\$ -
Business SME				MPI - NI		\$ -	145	\$ -	-145	\$ -
Security	MPI - NI	91	\$ -	MPI - NI		\$ -			91	\$ -
Security				MPI - NI		\$ -	16	\$ -	-16	\$ -
IT Services	Ext	67	\$ 8,400	Ext		\$ -		\$ -	67	\$ 8,400
IT Services	MPI - NI	38	\$ -	MPI - NI	4	\$ -		\$ -	38	\$ -
Total Operational		1,261	\$ 78,625		591	\$ 43,969	1,053	\$ 61,256	138	\$ (26,600)
SubTotal		5,772	\$ 440,576		2,941	\$ 314,304	5,212	\$ 377,525	-1,076	\$ (251,253)
Software/Licensing			\$ 103,423					\$ 103,423		
Contingency - 20%			\$ 88,115	Variance:				\$ 75,505		
				Blended vs. Actual Rate		\$ (16,063)				
TOTAL		5,772	\$ 632,114		2,941	\$ 298,241	5,212	\$ 556,453		



CHANGE REQUEST

CR-PS-03

Variance Analysis:

	Effort	Cost	Notes
Business			
Business Architecture Lead	(347)	\$ (26,025)	
Business Analysts	(779)	\$ (125,036)	Underestimate effort, as well as Increased effort due to additional scope. Added a 2nd BA at 50% allocation.
Total Business	(1,126)	\$ (151,061)	
Technical			
Data Architect	72	\$ 7,635	Reduced effort required due to reduced reporting and data required
Technical Architect	-83	\$ -	
Technical Architect	-18	\$ (2,502)	
System Analyst	-84	\$ (11,676)	Added SA for one month oversight for SIT
Developer	22	\$ 15,750	Utilizing a non-incremental employee. Original estimate was for an external resource.
Integration Centre- 1	223	\$ 26,357	
Integration Centre- 2	-29	\$ -	Decrease in effort as the number of reports and data required has been reduced.
Integration Centre- 3	-45	\$ (3,371)	
Total Technical	58	\$ 32,194	
UAT			
Test Coordinator	5	\$ -	
Senior SUA	-37	\$ -	
SUA	-508	\$ -	
QC&M Testing Analyst	43	\$ -	
Total QC&M (UAT)	(495)	\$ -	No budget impacts. Increased effort with re-planning.
Change Services			
Change Lead	405	\$ -	Reduced hours than initially planned due to resource constraints.
Change Lead	-206	\$ (15,415)	Incremental resource added to project.
Change Services	199	\$ (15,415)	
KMS			
KMS - Technical CommOfficers	148	\$ (15,154)	Decreased effort but cost increase due to allocated resource being incremental
KMS	100	\$ 12,537	Planned external resource not utilized
KMS	-400	\$ -	Non planned resources for KMS - incremental and non-incremental
Instructional Designer	-18	\$ (1,369)	
Total KMS	-170	\$ (3,986)	
Project Management			
Project Manager	92	\$ (97,879)	PM effort increased to re-plan and provide a detailed schedule and plan and to manage the team and critical path.
Program Manager	293	\$ 28,030	Reduction in program oversight
Project Control Analyst	-65	\$ (16,537)	Increased effort from PCA to assist with project delivery
Total Project Management	320	\$ (86,386)	
Operational			
Business SME	119	\$ (35,000)	Increased effort and duration of incremental resource
Business Analytics	-17	\$ -	
Business SME	-145	\$ -	Added resource to assist with user stories. Non incremental.
Security	91	\$ -	
Security	-16	\$ -	
IT Services	67	\$ 8,400	Planned external resource not utilized
IT Services	38	\$ -	Planned internal resource not fully utilized
Total Operational	138	\$ (26,600)	
SubTotal	(1,076)	\$ (251,253)	

Impact on Information Security

No impact to Information Security

Steps to be Taken After Approval:

CR approval will increase project scope that will impact the schedule, resource allocations and budget.

Note: If there are financial implications in the CR, it must be reviewed and approved by the Director of Enterprise Portfolio Management Services prior to seeking any approvals.

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CHANGE REQUEST

CR-PS-03

BTO AUTHORIZATION

Name:	Robin Hildawa	Signature:	<i>See SharePoint Workflow</i>
Role:	Manager, EPMO	Date:	
Name:	John Krupinski	Signature:	<i>See SharePoint Workflow</i>
Role:	Manager, Budgeting	Date:	
Name:	Gary Dessler	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate System Architect	Date:	
Name:	David Paradis	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, Project Delivery	Date:	



CHANGE REQUEST

CR-PS-03

SENIOR MANAGEMENT AUTHORIZATION

Name:	Ken Harkness	Signature:	<i>See SharePoint Workflow</i>
Role:	Director, BTO	Date:	
Name:	John Remillard	Signature:	<i>See SharePoint Workflow</i>
Role:	Corporate Business Architect	Date:	
Name:		Signature:	
Role:		Date:	

- No further approvals are required beyond Corporate Business Architect
- Executive Project Sponsor(s) approval is required



CHANGE REQUEST

CR-PS-03

Executive Approval (If applicable)			
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Business Development & Communications & Chief Administrative Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP IT & Business Transformation & Chief Information Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Customer Service & Chief Operating Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Finance & Chief Financial Officer Signature: Date:		
Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: VP Human Resources & Corporate Services & Chief Human Resources Officer Signature: Date:	Status: (A)pproved (R)ejected <i>(Please circle one)</i> Name: Role: Chief Actuary & Vice President, Product and Risk Management Signature: Date:		