CLJCMS
COURTS OF LIMITED JURISDICTION
CASE MANAGEMENT SYSTEM

bluecrane

Washington Courts
Judicial Information Systems Committee (JISC)

Background on Quality Assurance

bluecrane

February 26, 2021

Agenda

- Definition of “Quality Assurance”
- *bluecrane’s* Approach to QA
- Key Success Factors for QA
- Monthly QA Deliverable

What is “Quality Assurance”?

- QA is the ongoing, independent assessment of project management processes and activities
- When used effectively, QA consulting services provide Executive Sponsors, Sponsors, Steering Committees, and project managers and their teams with valuable independent insight into how well project activities are going and where corrections might be needed
- Fundamental differences between Project Management, QA, and auditing
  - ✓ Project Management is ***directive*** and a part of direct “line” management
  - ✓ QA is independent, external, collaborative, and advisory (forward-looking)
  - ✓ Auditing is independent, external, and usually backward-looking

bluecrane's QA Approach - General

- We apply the same project management rigor and discipline to our own work that we assist our clients in applying to their projects
- Approach is founded on frequent contact and interaction with the project sponsor, project manager, members of the project team, and other stakeholders
  - ✓ Fosters a healthy relationship for achieving the primary objective of all involved: the successful delivery of the project's deliverables within approved budget, schedule, scope, and quality parameters
- Philosophy of "early warning"
- Reviews and assessments will address *"whatever needs addressing at that moment/stage/phase of the project under review"*
  - ✓ It's a mistake to get too prescriptive about QA areas of assessment too soon
  - ✓ We look ahead to provide you with risk warnings, avoiding an "audit" only approach that looks backward

bluecrane's QA Approach – Other Key Differences

- Principal has managed large-scale projects and has served as the general manager of three different businesses
  - ✓ Ability to communicate effectively with executives and governance bodies, as well as project managers and technical staff
  - ✓ Personal understanding of "the stakes," i.e., what the organization is "putting on the line" in order to deliver on large technology efforts

- Unique blend of business strategy, organizational dynamics, general management, and technology implementation experience
- Willingness to "roll-up" our sleeves with the project/technical team
- Focus on 2 or 3 things per month *that make a difference*
  - ✓ Reports are not a laundry list of minutia to justify our existence!
- Significant interaction that goes well beyond periodic, published reports
  - ✓ Sensitivity to what is and what is not appropriate for public reports

Surfacing, Escalating, and Resolving Issues

- Our "Early Warning" philosophy is aimed at pre-empting bad news by discovering risks and raising them as early as possible for response
- Approach for surfacing and resolving issues
  - ✓ Direct, frank communications
  - ✓ In-person *(Zoom these days!)*
  - ✓ With suggestions for response (mitigation or other)
  - ✓ Discuss with project manager and project sponsor before communicating outside the project
- Escalation of discussions, when needed:
  - ✓ We first approach the project manager, team, and vendors with concerns to avoid surprises and eliminate unknowns
  - ✓ Then, we present to others in the (previously agreed-to) escalation chain *exactly what we reviewed* with the project manager, team, and vendors

How We Do Our QA Work

- Review project artifacts
  - ✓ Plans, logs, change requests, risks, issues, etc.
  - ✓ Schedules
  - ✓ Access to project's Sharepoint site (or whatever the project's document repository may be)
  - ✓ Consistency with Best Practices and industry standards

- Attend "key" standing project meetings
  - ✓ Project leadership team meetings
  - ✓ Status meetings

- Attend Steering Committee meetings
  - ✓ Present QA report

- Regularly scheduled check-in meetings with Project Manager and Sponsors

- Ad hoc meetings, upon request or as needed

Key Success Factors for QA

A truly successful QA effort is one in which . . .

- Trust is achieved
- Frank and open dialogue is established and maintained
- QA has easy access to the real details of the project
  - ✓ Actual performance
  - ✓ Relationships
  - ✓ Political realities
  - ✓ Financial realities
- QA is involved in early stages of planning of project activities and deliverables
- Management commends project management and team for implementing recommendations to resolve problems identified by QA (rather than criticizing them)
- Project environment is open to identifying, vetting, and mitigating risks and issues (as opposed to an attitude of “we have no risks!”)
- Project actively participates in risk management
- QA consultants are free to track calendars and attend project meetings

QA Monthly Deliverable

- At the end of each month, we provide a written report of our risk assessment for the CLJ-CMS Project
  - ✓ Our first report since the “re-launch” of CLJ-CMS is the February 2021 report
- We do ***not*** wait for our monthly report to raise risks and issues
  - ✓ That would be inconsistent with our “No Surprises” philosophy
  - ✓ Also . . . there’s no valid rationale for waiting!

bluecrane Risk Ratings

Assessed Risk Status	Meaning
No Risk Identified	Program activities in the area assessed are not encountering any risks
Risk Being Addressed	A risk that is being adequately mitigated. The risk may be ongoing with the expectation it will remain blue for an extended period of time, or it may be sufficiently addressed so that it becomes green as the results of the corrective actions are realized
Risk	A risk that is significant enough to merit management attention but not one that is deemed a “show-stopper”
High Risk	A risk that project management must address or the entire planning effort is at risk of failure; these risks are “show-stoppers”
Not Started	This particular activity has not yet started or is not yet assessed
Completed or Not Applicable	This particular item has been completed or has been deemed “not applicable” but remains a part of the assessment for traceability purposes

Areas of Assessment for February 2021 QA Report

Project Management and Sponsorship

- Budget: Funding
- Budget: Management of Spending
- Scope: e-Filing
- Scope: Supervision
- Scope: CMS
- Schedule: e-Filing
- Schedule: Supervision
- Schedule: CMS
- Governance
- Contract and Deliverables Management
- Program Staffing
- PMO Processes

Solution

- Business Process: e-Filing
- Business Process: Supervision
- Business Process: CMS
- Requirements, Design, and Configuration: e-Filing
- Requirements, Design, and Configuration: Supervision
- Requirements, Design, and Configuration: CMS
- Integrations: e-Filing
- Integrations: Supervision
- Integrations: CMS
- Reports: e-Filing
- Reports: Supervision
- Reports: CMS
- Testing: e-Filing
- Testing: Supervision
- Testing: CMS
- Deployment: e-Filing
- Deployment: Supervision
- Deployment: CMS

People

- Stakeholder Engagement
- OCM: e-Filing
- OCM: Supervision
- OCM: CMS
- Communications
- Court Preparation and Training

Data

- Data Preparation: e-Filing
- Data Preparation: Supervision
- Data Preparation: CMS
- Data Conversion: e-Filing
- Data Conversion: Supervision
- Data Conversion: CMS
- Data Security

Infrastructure

- Infrastructure for Remote Work
- Statewide Infrastructure
- Local Infrastructure
- Security Functionality
- Access
- Environments
- Post-Implementation Support

Questions

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