



IT Project Status Report  
For an MHSA-Funded IT Project

Please send the **Signed Original** to the following address:

**California Department of Mental Health  
Information Technology  
Attention: MHSA-IT  
1600 9<sup>th</sup> Street, Room 141  
Sacramento, CA 95814**

Additionally, please E-mail a **Soft Copy** to:  
[DMH.MHSA-IT@dmh.ca.gov](mailto:DMH.MHSA-IT@dmh.ca.gov)

PROJECT INFORMATION		
Project Name:	Enterprise Data Warehouse	DMH Project ID #: SC-02
Executive Sponsor:	Nancy Pena, Ph.D.	County: Santa Clara
Title:	Director Mental Health Department	
Project Status	Budget Status	Report for Quarter Ending: 07/31/2010
<input checked="" type="checkbox"/> On Schedule	<input checked="" type="checkbox"/> Within Approved Budget	Project Start Date: January 2010 Project End Date: March 2012
<input type="checkbox"/> Ahead of Schedule	<input type="checkbox"/> Over Budget	
<input type="checkbox"/> Behind Schedule		
MHSA IT Project Contact Person's Name:	Sheila Yuter (Primary)	Sue Clements (Secondary)
Telephone Number:	408-885-3885	408-885-7085
E-mail Address:	<a href="mailto:Sheila.Yuter@hhs.sccgov.org">Sheila.Yuter@hhs.sccgov.org</a>	<a href="mailto:Sue.Clements@hhs.sccgov.org">Sue.Clements@hhs.sccgov.org</a>
Project Objectives:		
<p>To create a single data repository for all Mental Health Department service, administrative, financial and provider information. The data warehouse will integrate information to improve the ability of SCVHHS to measure key clinical and administrative metrics through enhanced business intelligence reporting capabilities. The data warehouse will directly support treatment decisions, new program design and management decision-making activities.</p>		

MAJOR MILESTONE STATUS						
Project Phase	Deliverables / Milestones	Planned Start	Actual Start	Planned End	Actual End	Status
Procurement	<ul style="list-style-type: none"> <li>◆ RFP for Services</li> <li>◆ Vendor Selection / Contract Negotiations</li> </ul>	July 2010		Dec 2010		On Schedule
Initiation / Planning Phase	<ul style="list-style-type: none"> <li>◆ Select Project Manager</li> <li>◆ Identify Stakeholders</li> <li>◆ Document Business Need</li> <li>◆ Document Assumptions and Constraints</li> <li>◆ Develop Charter</li> <li>◆ Develop Project Scope Statement</li> <li>◆ Identify Team Members</li> <li>◆ Obtain Resources</li> <li>◆ Create Activity List</li> <li>◆ Develop Schedule</li> <li>◆ Develop Quality Measures</li> <li>◆ Risk Assessment</li> <li>◆ Develop final Project Management Plan</li> </ul>	Jan 2011	Jan 2010	Dec 2010		On Schedule
Requirements Phase	Document: <ul style="list-style-type: none"> <li>◆ Functional and Data Requirements</li> <li>◆ Hardware Requirements</li> <li>◆ Software Requirements</li> <li>◆ Operational Requirements</li> <li>◆ Security Requirements</li> <li>◆ Legal Requirements</li> <li>◆ Future Requirements</li> </ul>	July 2010		Feb 2011		Not Started

Project Phase	Deliverables / Milestones	Planned Start	Actual Start	Planned End	Actual End	Status
Design Phase	<ul style="list-style-type: none"> <li>◆ Design database</li> <li>◆ Identify data sources for EDI</li> <li>◆ Create data exchange interfaces</li> <li>◆ Create data model</li> <li>◆ Create user interface</li> <li>◆ Design Edit Transformation Load (ETL) functionality</li> <li>◆ Design technical architecture</li> <li>◆ Develop training strategy and plan</li> </ul>	March 2011		Dec 2011		Not Started
Construction Phase (Software Deployment for COTS)	<ul style="list-style-type: none"> <li>◆ Environment Development (Production, Development and Testing)</li> <li>◆ Software Development (coding)</li> <li>◆ Develop EDI interfaces</li> <li>◆ Develop ETL functionality and interfaces</li> </ul>	March 2011		Dec 2011		Not Started
Testing Phase	<ul style="list-style-type: none"> <li>◆ Define the overall strategy and detailed test plans</li> <li>◆ Develop test case, scripts or scenarios aligned with requirements</li> <li>◆ Execute the performance and documentation of testing activities, defect and error detection and defect resolution</li> <li>◆ Report to stakeholders the status of testing and whether the system is ready for release</li> <li>◆ Evaluate the success of the testing process and implement improvements</li> </ul>	March 2011		Dec 2011		Not Started
Implementation Phase	<ul style="list-style-type: none"> <li>◆ Execute Training Strategy and Plan</li> <li>◆ EDW live for end users</li> </ul>	Jan 2012		Feb 2012		Not Started
Post-Implementation Phase	<ul style="list-style-type: none"> <li>◆ Confirm work is done to requirements</li> <li>◆ Formal Acceptance of Deliverables</li> <li>◆ Index and archive records / Knowledge Base</li> </ul>	Feb 2012		Feb 2012		Not Started
PIER	<ul style="list-style-type: none"> <li>◆ Objectives Achieved</li> <li>◆ Lessons Learned</li> <li>◆ Corrective Action</li> <li>◆ Next Steps</li> </ul>	Feb 2012		March 2012		Not Started

TOTAL PROJECT BUDGET INFORMATION		
Include All Funding Sources (MHSA And Any Other County Funding)		
Category	Budgeted Costs	Actual Costs to Date
Staff (Salaries & Benefits)	\$1,384,000	\$18,551
Hardware Purchase	\$ 160,000	\$0
Software	\$ 600,000	\$0
Administrative Overhead	\$30,000	\$0
Other Expenses	\$70,000	\$0
Contract Services	\$ 400,000	\$0
<b>Total Project Costs</b>	<b>\$ 2,644,000</b>	<b>\$18,551</b>

Performance Measurement Category	Planned to Date	Actual to Date	Estimate to Complete (ETC)
Project Hours	322	243	
Project Cost	\$24,400	\$18,551	\$2,625,449
Justification (If Actual And Planned Differ By More Than 10%):			

STATUS / MAJOR ACCOMPLISHMENTS / SCHEDULED ACTIVITIES
<p><b>STATUS</b></p> <p>Currently in RFP process for an EDW. Anticipate vendor selection by early 2011.</p> <p><b>ACCOMPLISHMENTS</b></p> <ul style="list-style-type: none"> <li>◆ Select Project Manager</li> <li>◆ Identify Stakeholders</li> <li>◆ Document Business Need</li> <li>◆ Document Assumptions and Constraints</li> <li>◆ Develop Charter</li> <li>◆ Develop Preliminary Project Scope Statement</li> <li>◆ Identify Team Members and Resource Needs</li> </ul> <p><b>SCHEDULED ACTIVITIES</b></p> <ul style="list-style-type: none"> <li>◆ Obtain Resources</li> <li>◆ Create Activity List</li> <li>◆ Develop Schedule</li> <li>◆ Develop Quality Measures</li> <li>◆ Determine Communication and Change Management Plan</li> <li>◆ Complete Risk Assessment</li> <li>◆ Develop Final Project Management Plan</li> <li>◆ Approval of Final Project Management Plan</li> </ul>

RISK AND ISSUE MANAGEMENT

**Risk And Issue List Report**

(Please Provide The Risk And Issue Log Along With Mitigation, Contingency Plan For Each Risk And Resolution Plan For Each Issue. )

Risk management planning will be done in the near future. The plan will document the process of deciding how to approach and plan risk management activities. Key elements of the risk management plan are:

1. Risk Identification (identifies and documents all the risks that can affect the project).
2. Risk Analysis
  - Qualitative risk analysis (determine the consequences of identified risks on project objectives).
  - Quantitative risk analysis (assign numeric probabilities to each risk and their impact on project objectives)
3. Risk response planning (decide what actions are needed to reduce threats, including assignment of a risk owner to each risk)
4. Risk monitoring and control (respond to risks as they occur; define the process for updating the plan, create a “watch list”, monitor actions the owner is to take.

Below is the listing of initial risks that have been recognized.

ID	Risk (Describe The Risk In Simple Terms; Provide Any Details In Additional Comment Sheets. )	Probability	Impact	Timeframe	Response	Escalate d To DMH
	System Performance <ul style="list-style-type: none"> <li>▪ System availability and speed</li> <li>▪ High maintenance</li> <li>▪ Loss of data</li> </ul>					
	Data Requirements are not clearly defined					
	Integration incompatibilities					
	Inadequate Training					
	Insufficient Resources					

---

Post Implementation Evaluation Report

Please Include the Following Sections In Your Final Status Report

OBJECTIVES ACHIEVED
<p>Describe the Achieved Objectives in Comparison to the Objectives Listed in the MHSA IT Funding Request form. Also describe the User and Management Acceptance of the Completed Project.</p> <ul style="list-style-type: none"><li>•</li></ul>

LESSONS LEARNED
<p>Describe Lessons Learned, Best Practices used for the project, any Notable Occurrences, or Factors that contributed to the project’s success or problems, or other information, which could be helpful during future project efforts. Describe Problems that were Encountered and How they were Overcome.</p> <ul style="list-style-type: none"><li>•</li></ul>

CORRECTIVE ACTIONS
<p>Note: This section must be included when the project is deemed to be a Limited Success or Failure, or when there are Significant Differences between Project Expectations and Project Results. If this condition applies, summarize alternatives for improving the outcome.</p> <ul style="list-style-type: none"><li>•</li></ul>

NEXT STEPS
<p>Describe if the project has any Future Phases or Enhancements; or will it be in Maintenance Phase.</p> <ul style="list-style-type: none"><li>•</li></ul>

**County Approvals**

*Nancy Pena*      *08/05/10*      *408 885 5782*  
 \_\_\_\_\_  
 Nancy Pena, Ph.D. – Director Mental Health Department      Date      Phone

*Dennis Kotecki*      *08/10/10*      *408-793-6612*  
 \_\_\_\_\_  
 Dennis Kotecki – SCVHHS CIO      Date      Phone

Prepared By:  
*Sue Clements*      *8/11/10*      *408 885 7082*  
 \_\_\_\_\_  
 Sue Clements, PMP - MHSA TN Project Manager      Date      Phone

Please send the **Signed Original** to the following address:

**California Department of Mental Health  
 Information Technology  
 Attention: MHSA-IT  
 1600 9<sup>th</sup> Street, Room 141  
 Sacramento, CA 95814**

Additionally, please E-mail a **Soft Copy** to:  
[DMH.MHSA-IT@dmh.ca.gov](mailto:DMH.MHSA-IT@dmh.ca.gov)