Information Technology Activity Report

Agency of Digital Services

Enterprise Project Management Office (EPMO)

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About This Report

This report was produced by the Enterprise Project Management Office (EPMO), which is part of the Agency of Digital Services (ADS). The purpose of the report is to provide information regarding the performance of technology projects under the oversight of the EPMO and to provide a summary of independent reviews that were conducted during the reporting period.

This report is a point in time report and only includes information technology (IT) activities for the Executive Branch of State government and was compiled in collaboration with the State entities who have a qualifying project. Future costs and dates projected in this report are estimates based on current information and are subject to change. This report includes all IT Activities that have implementation costs occurring on or after July 1, 2018. IT activities are organized within this report by a State Agency/Entity.

Project Status Categories

To ensure transparency and accountability in managing Vermont EPMO projects, we use a color-coded status system. This system provides a clear view of project health across three key dimensions: Scope, Schedule, and Budget. Each color signals the level of risk and the need for attention:

Quick Reference Chart:

Color	Meaning	Action Required
Green	Healthy status	Continue monitoring
Yellow	Moderate risk	Investigate and address issues
Red	High risk	Escalate and implement corrective measures

Why This Matters

This system helps identify risks early and ensures timely corrective action.

Green projects are progressing as planned.
Yellow projects need attention to prevent escalation.
Red projects require immediate intervention and may impact delivery timelines or funding.

Statutory requirements met in this report:

Vermont state statutes require the EPMO to provide information regarding technology projects under its oversight as follows:

3 V.S.A. chapter 56 § 3303 (a)(4)

(a)(4) an outline summary of information, including scope, schedule, budget, and status for information technology projects with total costs of $500,000.00 or greater.

3 V.S.A. chapter 56 § 3303 (d)(1)

(d)(1) The Agency shall obtain independent expert review of any new information technology projects with a total cost of $1,000,000.00 or greater or when required by the Chief Information Officer.

Independent Reviews completed from November 12, 2024, through December 31, 2025

IT Activity Name			
Agency	**Department**	**Project**	**Date**
	Cannabis Control Board	VT Cannabis Control Board Phase 2 Project	11/12/2024
Human Services	Health	Medical Board Licensing (MBL) System Project	12/3/2024
Digital Services		ADS Mainframe Hosting Project	12/12/2024
Digital Services		Network Modernization Project	3/12/2025
	Attorney General's Office	Legal Case Management System	5/15/2025
Human Services	Department of Vermont Health Access	Medicaid Management Information System Interoperability & Patient Access Phase 2 Project	5/30/2025
Human Services	Department of Vermont Health Access	Medicaid Management Information System, Department of Corrections Justice Re-Entry Program	7/7/2025
Human Resources	Department of Vermont Health Access	Vermont Health Connect Oracle Upgrade & Cloud Migration	11/17/2025

These independent reviews are available on our ADS EPMO website at* Independent Reviews | Enterprise Project Management Office (vermont.gov) **Note: Independent Reviews are not posted publicly until the subject vendor contracts have been fully executed.

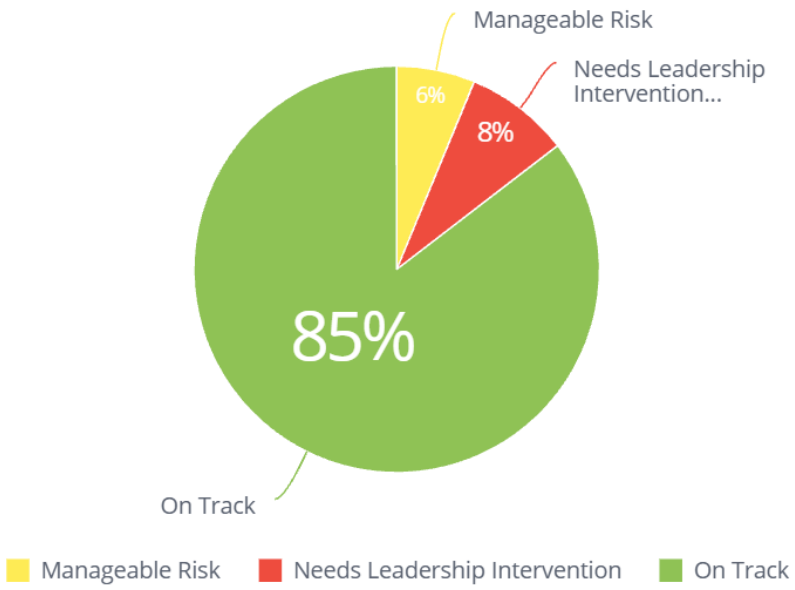
Summary & Metrics

Portfolio Summary & Metrics

The following pages of this report provide metrics related to the overall portfolio performance of projects across the Executive branch. This data is a point in time view of how the portfolio was performing as of March 25, 2025.

Overall, the projects managed by the EPMO are performing well with 68% on track according to the scope of work, the schedule and the budget estimated, 25% have risks that have been identified and are actively being managed by the project teams. 7% of all active projects are currently at risk and require leadership intervention. More details regarding individual project performance are available in the sections below.

OVERALL PORTFOLIO STATUS



SCHEDULE VARIANCE

Schedule variance is a term used in project management to describe the difference between how much work was planned to be completed by a certain time and how much work has been completed. In essence, schedule variance helps you understand whether you are ahead of schedule, on track, or behind schedule in completing your tasks or projects. Project managers regularly monitor schedule variance to ensure that the project stays on track and to adjust as necessary. The following is data related to how projects performed according to the schedule data captured by the State project teams.

Projects	Active Projects	Overdue Projects	Task Completion Progress
48	48	7	74%

BUDGET VARIANCE

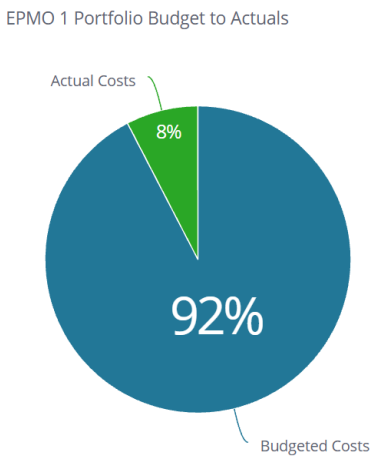
Budget variance in IT projects refers to the difference between the projected budget and the actual expenditure incurred during the project's lifecycle. This financial metric is crucial for project managers and stakeholders as it provides insights into the financial health and efficiency of a project. Understanding budget variance helps in identifying areas where costs can be controlled or optimized, ensuring that resources are allocated effectively. It also aids in future project planning by highlighting potential risks and areas for improvement in budgeting practices. Effective management of budget variance is essential for the successful delivery of IT projects within the constraints of time, cost, and quality. The following charts provide information on how project budgets performed at an Enterprise level. More details regarding individual project budget performance are available in the detailed reports later in this report.

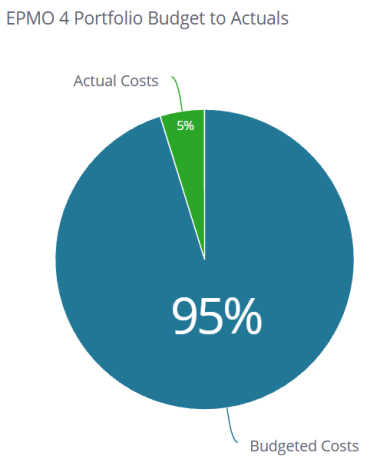
The EPMO is organized into three portfolios. EPMO 1, EPMO 4 and EPMO 5. Each portfolio is responsible for projects aligned to our customers.

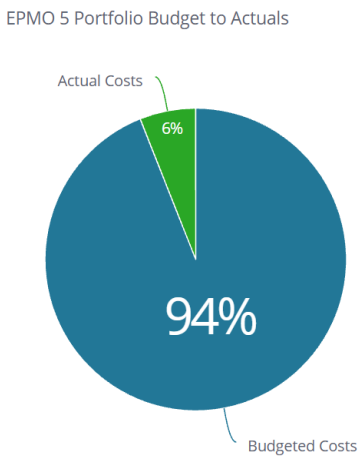
Budget to Actuals by Portfolio

EPMO Portfolio ID	Total Invoiced Cost	Total Budget Cost
EPMO 1	39,027,444.96	473,372,763.74
EPMO 4	31,818,857.43	634,842,362.83
EPMO 5	17,486,377.11	273,885,462.55

- EPMO1 supports the Agencies of Administration, Digital Services, Education, and the Department of Labor.
- EPMO 4 supports the Agency of Human Services
- EPMO 5 supports the Agencies of Agriculture, Commerce and Community Development, Natural Resources, Public Safety, Transportation and other small departments, boards and commissions.







Total Estimated Implementation Costs

$422,376,886.82

Implementation costs are the one-time project costs to implement the solution. Includes both federal and state dollars.

Top 10 Projects for Highest Estimated Total Implementation Costs

Rank	Entity	Project	Total Implementation Costs
1	Human Services	AHS DVHA Integrated Eligibility and Enrollment System (VT-IES)	$112,099,813.80
2	Human Services	AHS DVHA MMIS Medicaid Data Warehouse & Analytic Solution (MDWAS)	$63,513,862.01
3	Transportation	AOT - DMV - Core Systems Replacement	$51,210,563.00
4	Administration	AOA - Enterprise Resource Planning (ERP)	$48,204,422.78
5	Labor Department	VDOL - Unemployment Insurance Modernization	$30,663,324.52
6	Transportation	AOT (VAMIS) Vermont Asset Management Information System.	$12,733,695.34
7	Human Services	AHS DCF CCWIS	$9,496,708.00
8	Human Services	AHS IEE Noticing Solution	$8,681,593.08
9	Administration	AOA - BGS - eProcurement (VTBuys)	$8,587,093.00
10	Transportation	AOT - HD - Construction Management System (CMS)	$ 6,262,477.99

Total Estimated Operational Costs

$318,387,755.93

Total costs to operate & maintain the solution through its life. Includes both federal and state dollars.

Top 10 Projects for Highest Estimated Operational Costs

Rank	Entity	Project	Total Operational Costs	# Years
1	Human Services	AHS DVHA Integrated Eligibility and Enrollment System (VT-IES)	$119,592,991.00	5
2	Human Services	AHS DHVA MMIS Medicaid Data Warehouse & Analytic Solution (MDWAS)	$49,627,254.00	5
3	Transportation	AOT DMV Core Systems Replacement	$46,069,917.00	5
4	Administration	AOA Enterprise Resource Planning (ERP) Project	$23,011,043.07	
5	Digital Services	ADS Network Modernization	$12,667,000.00	5
6	Human Services	AHS VHIE Maintenance & Operations – 2024	$6,182,097.00	5
7	Human Services	ADS Mainframe Outsourcing RFP	$5,923,894.16	1
8	Transportation	ADS ACD Modernization	$5,534,369.00	5
9	Transportation	Vermont Asset Management Information System (VAMIS)	$4,685,468.33	8
10	Digital Services	ADS Cloud Infrastructure Refresh	$4,588,455.00	5

Total Estimated IT Activity Costs

$740,764,642.75

Total IT Activity costs to implement, plus the costs to operate and maintain the solution.
Includes both federal and state dollars.

Top 10 Projects for Highest Estimated IT Activity Costs

(Estimated Implementation + Estimated Operating costs)

Rank	Agency	Project	Total IT Activity Costs
1	Human Services	AHS DVHA Integrated Eligibility and Enrollment System (VT-IES)	$112,099,813.80
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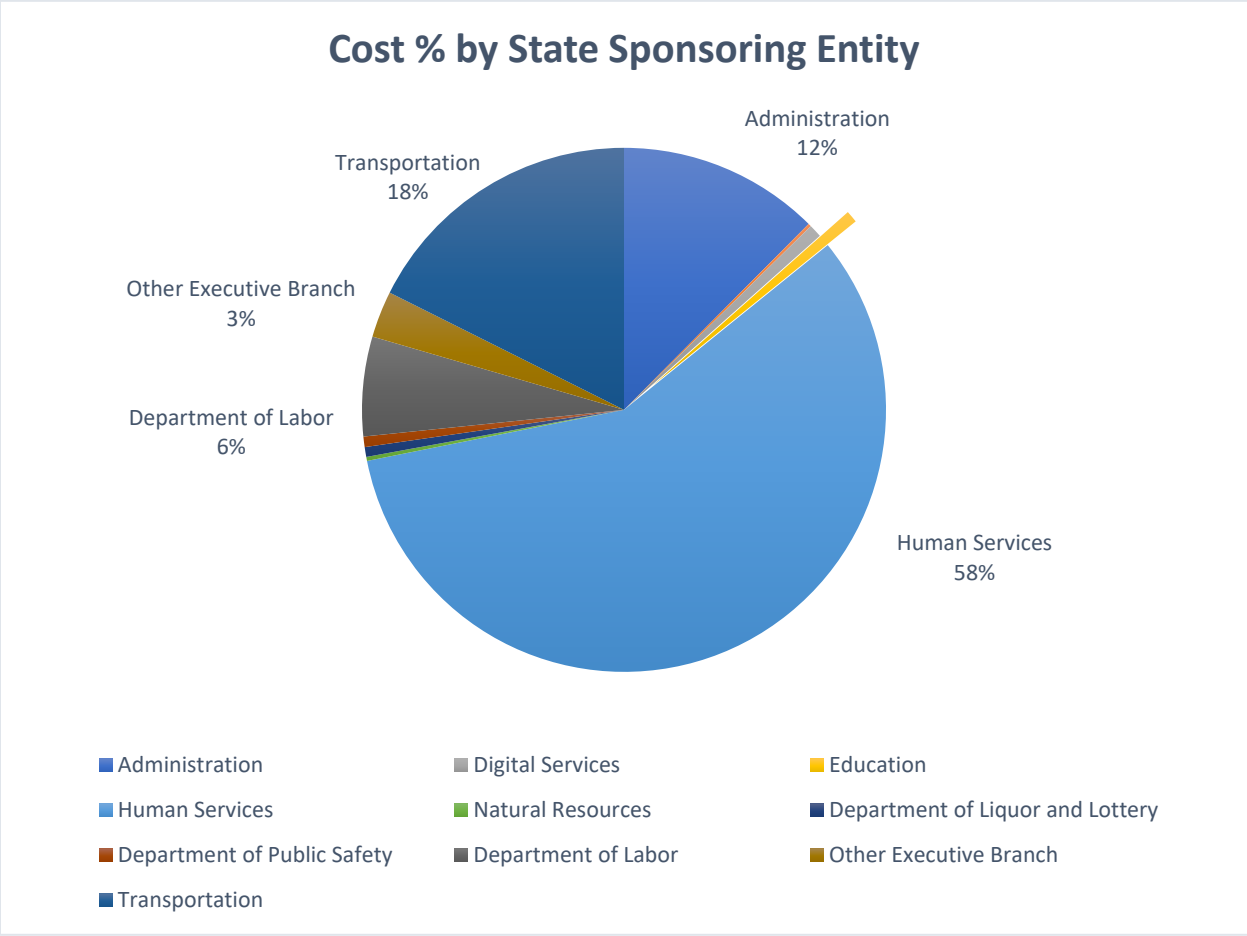


PROJECT COMPLETIONS

The following IT projects successfully closed during this reporting period:

Completed Projects in 2025	Completion Date	Successes
ADS ACD Modernization	6/30/2025	The Automatic Call Distribution (ACD) system provides the functionality for 14 call centers operated by state agencies. This project replaced the current on-premises system.
AOE - Child Nutrition Management System	5/30/2025	Implemented a new Child Nutrition Management System that replaced an existing legacy platform.
AOT Wrike Implementation	5/30/2025	Implemented a configurable, cloud-based project scheduling and management solution for AOT infrastructure projects.
SOS - Safe at Home	5/29/2025	Implemented a system to support victims of domestic violence, sexual assault, and stalking, who have relocated or are about to relocate, in their effort to keep perpetrators from finding them
DPS - Data Dashboard	5/16/2025	Implemented a Criminal Justice Information System compliant data lake. Produced Heat Maps, Performance Metrics, Public Facing de-identified dashboards, Identify and Document Data Sources, Develop Data Quality and Governance Standards (Documentation), Interactive Dashboards available for public consumption.
SOS - Business Filing System	1/30/2025	Implemented a full replacement of Vermont Secretary of State's business services platform, (including uniform commercial code and temporary officiant processing), positioning the business services application (Document Management and Electronic Filing System) towards software modernization, and incorporating cyber security compliance that addresses today's security risks.
DPS - VSP - Workforce Management Scheduling Solution	10/1/2024	Implemented scheduling software for all of Vermont State Police's (VSP) divisions and units to utilize that encompasses a wide range of functionality in scheduling and tracking employees’ work hours.

AOE - DMAD - Education Data Standard Ed-Fi	9/24/2024	Implemented a platform to connect educational data systems. Implementation of the Ed-Fi standard and model at the state level streamlines collection from Local Education Agencies (LEAs) through an API process, standardized operational data store (ODS), and near real-time feedback loops for data quality checks.
ADS - Windows 11 Upgrade	3/28/2025	Upgraded all State computer operating systems to Windows 11.
ADS - Shared Services - VoIP	3/19/2025	Implemented an Enterprise IP telephony platform reaching across the State, enabling the State to support existing hosted VoIP environments.
AOA - Vermont Business Portal	8/13/2025	Implemented a portal to provide a single point of entry for starting and operating a business in Vermont. The first phase of the project created a business navigator that connects new businesses with the appropriate agency and resources. The initial phase included resources from the Secretary of State (SOS), Department of Tax (Tax), Department of Labor (VDOL), and the Agency of Commerce and Community Development (ACCD).
AHS - CO Critical Incident Reporting HCBS Programs	9/15/2025	Implemented a critical incident reporting module for its HCBS programs across different departments to follow CMS rules.
AHS - CO Refugee Resettlement Program	9/27/2025	Implemented a centralized data system that collects refugee data including demographic and services data to be used by service provider partners and the State refugee office - primarily for data collection and reporting requirements for federal funders and for service coordination.

AHS - DCF CDD Integrated Information System Phase 1	8/31/2025	Developed a modular Case Management solution within its Salesforce platform resulting in enhanced case management processes, improved data sharing, and efficient collaboration among stakeholders, enabling the State of Vermont to effectively manage cases and provide quality services to its constituents
AHS - VDH EDRS FHIR	5/23/2025	The State implemented Fast Healthcare Interoperability Resources (FHIR) standards that define how healthcare information can be exchanged between different computer systems regardless of how it is stored in those systems. This will modernize death reporting between the Vermont Department of Health and CDC's National Centers for Vital Statistics System. This work will improve death reporting timeliness and overall data quality. Ultimately, this will help the CDC and the state recognize and track developing health threats.
AHS - VDH StarLIMS System Upgrade	4/30/2025	The project is successfully closed out, with the upgrade live and no reported issues. It has been completed under budget, with no remaining risks or resource constraints. The scope is finalized, and the project closed before the contract end date of 4/30/2025.
AHS - VHIE Collaborative Services 2024	6/1/2025	Worked with the National Opinion Research Center (NORC) to develop a Social Determinants of Health (SDoH) Roadmap. The project included stakeholder engagement, landscape survey and needs assessment, training and education plan and implementation strategy. Project was completed 6/1/25
AHS - VHIE Promoting Interoperability Program (PIP) 2024	6/30/2025	Rural Health Transformation Program (RHTP): response to Notice of Funding Opportunity (NOFO) Worked with Manatt Consulting to prepare the state's application for funding. The project involved working across multiple agencies and stakeholders and could result in up to 1B dollars in funding over the next

		5 years addressing challenges facing rural health care in Vermont.
AHS - VHIE - VHIE Connectivity 2024	6/30/2025	Successfully advanced VHIE Connectivity by completing three Pilot projects in collaboration with the Vermont Department of Public Health: (1) Enabling recurring integration of health measurement, blood iron levels, and immunization data from the VHIE into the Women, Infants, and Children Nutrition Program (WIC) vendor's system on a recurring basis; (2) Integrating Vital Records, specifically adding Birth data; and (3) Expanding the Immunization Registry file provided by VDH to integrate immunization data beyond COVID immunizations.
AHS - VHIE - VHIE Maintenance & Operations - 2024	6/30/2025	Advanced HIE platform enhancement/upgrade efforts by completing the RFP and vendor evaluation process with VITL to identify a preferred HIE-as-a-Service solution, positioning the platform for modernization."
AOT - DMV - Core Systems Replacement	12/1/2025	The DMV Modernization project successfully delivered two major releases: Vehicle Services (VS) and Driver Services (DS). The VS release went live on November 13, 2023, and included enhancements such as vehicle titling, registration, renewals, impound records, dealer licensing and regulation, inventory management for plates and permits, and Point of Sale integration. The DS release, launched on November 12, 2025, focused on issuing and maintaining driver's licenses and IDs, supporting fraud detection and investigation, managing hearings and scheduling, and administering driver restrictions and improvements. Together, these releases modernized the DMV's core functions, enhancing service efficiency and effectiveness.

AOT - HD - Construction Management System (CMS)	11/14/2025	The Construction Management System project successfully replaced multiple legacy systems, enhancing overall efficiency and functionality. Scope modifications were effectively managed through a structured Software Development Life Cycle (SDLC) process, which prioritized essential changes to meet business and functional requirements. The SDLC process was continuously refined, improving evaluation, approval, and implementation of scope changes. Despite schedule delays, the project stayed within the original contract amount. While the transition from Site Manager to iPD requires further effort, and Doc Express will continue to be used for document management, the project largely achieved its goal of modernizing construction management processes.
AOT - SharePoint Modernization	5/23/2025	Create a Modern SharePoint structure to which they migrate AOT files. Vendor will advise AOT on the structure and layout, and provide training/resources on how to use the functionality to best serve AOT employees.

Annual Report Key Below is the template used for the annual reports. Explanations for each field is provided in green font.

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	Name of the IT Activity				
Agency/Department	Name of the Requesting Agency/Department		**Current Project Phase**		Phase
Original Project Start Date	Start Date	**Original Project Estimated End Date**	End Date	**Number of Change Orders Approved**	
Actual Start Date	Actual Start Date	**Current Estimated End Date**	Current End Date	**Overall Status**	Current Health (Red, Yellow, Green)
Project	**Status**		**Update**		
Scope	Current Health (Red, Yellow, Green)		Project status update as it relates to the project Scope		
Schedule	Current Health (Red, Yellow, Green)		Project status update as it relates to the project Schedule		
Budget	Current Health (Red, Yellow, Green)		Project status update as it relates to the project Budget		
Overall	Current Health (Red, Yellow, Green)		Project status update as it relates to the project overall		
Scope Summary					
Summary of the project's scope of work and objective					
Schedule Summary					
Summary of the project's timeline to be completed and operational.					
Budget Summary					
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**			
Total cost to implement the solution	Total Current cost to implement the solution	Indicators if performing on track, over or under budget			
Total Original Estimated Operating Cost	**Total Current Estimated Operating Cost**	**Budget Status – Over or Under Budget**			
Total cost to operate the solution through its life cycle	Total Current cost to operate the solution through its life cycle	Indicators if performing on track, over or under budget			
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**			
Total cost for the IT Activity (Implementation + Operating)	Total Current cost for the IT Activity (Implementation + Operating)	Indicators if performing on track, over or under budget			
Solution Lifecycle Years	# of Years solution will be operating				

Agency of Administration (AOA)

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AOA - BGS - eProcurement (VTBuys)				
Agency/Department	Agency of Administration (AOA) Buildings and General Services		**Current Project Phase**		Execution
Original Project Start Date	7/4/2018	**Original Project Estimated End Date**	12/31/2025	**Number of Change Orders Approved**	16
Actual Start Date	10/7/2019	**Current Estimated End Date**	12/31/2025		
Project	**Status**		**Update**		
Scope	**MANAGEABLE RISKS**		The minimum viable product of the system was delivered and is now live. A new scope of work was approved under a change order. This work included streamlining the purchase requisition and invoice workflows to improve end-to-end processing, reduce cycle times and drive efficiencies in the procurement process. This work was completed and deployed to production on 11/10/2025. Work also concluded on improving the sourcing and contracting workflows. The release also included enhancements to the Procurement Advisory Team approval process effective 12/17/25. A plan to complete the remaining, undelivered scope is under negotiation between the State and the solution provider as part of a long-term maintenance and operations agreement. That scope includes completing work to bring the system into compliance with federal Accessibility rules, remediation of findings detected during the penetration vulnerability testing completed in the summer of 2025 and design/configuration of the State's Purchase Order rollover process which is critical for year end close out. Not timeline for completing the undelivered scope has been determined pending the completion of the new agreement.		
Schedule	**MANAGEABLE RISKS**		The system went live on 7/21/2025. Additional scope including streamlining the purchase requisition and invoice workflows to improve end-to-end processing, reduce cycle times and drive efficiencies in the procurement process was completed and deployed to production on		

		11/10/2025. Work concluded on improving the sourcing and contracting workflows on 12/17. HyperCare has been extended an additional month to allow BGS to negotiate a long term M&O agreement with KPMG therefore delaying project closeout.
Budget	**NEEDS LEADERSHIP INTEVENTION**	Overall, the project is trending over budget by 58% or $4,610,945.11. Costs are expected to continue to increase as the State negotiates a new Maintenance and Operations agreement with the solution provider. Final costs will be documented in the project closeout report which is expected to be completed in early 2026.
Overall	**MANAGEABLE RISKS**	

Scope Summary

The initial scope of the project envisioned delivering a Solution that would comprise full purchasing, sourcing, contracting and related processes with real-time integration to VISION and STARS at designated strategic points necessary to meet all State budget and financial management needs. The States' associated Functional Requirements are organized and presented below by the following procurement Workstreams.

- Need to Pay
- Catalog Capability
- Vendor Enablement/Management
- Sourcing/Bid Management
- Contract Management
- Spend/Data Analytics-Reporting

Due to repeated delays in the implementation plan for the project as described above, and the constraints on resources due to the extended duration of the project, some of the scope were de-prioritized and the team focused on delivering a minimum viable product to achieve a successful deployment in 2025. Minimum viable product (MVP) consisted of the following scope:

- Supplier Management
- Sourcing
- Contracting
- Purchase to Pay
- Analytics

The items that were part of the original scope and identified as out of scope for MVP in 2024 are as follows:

- Grants will not be moving into VTBuys and will be staying in VISION.
- Retainers will not be included in MVP –
- IT Retainers functionality is partially built without the backend financial integration for encumbering funds and requires additional development and testing before it can be deployed.
- P-Card Requirements and Design
- P-Card Reconciliation Requirements and Design
- Fiscal Year PO Rollover (This will need to be completed before June 30, 2026 for FY26 closeout).
- Spend Analytics
- Aware & WIMS Long Term Solution

In addition, the following work is required to be completed by Ivalua to ensure the system is fully compliant with Federal and State rules:

- Notification alert when uploading documents that contain potential malicious code – result of penetration testing. When this occurs, the documents are quarantined at the platform level (Ivalua) and not entered into VTBuys. Today, nobody is notified when this happens so documents including bid submissions could be lost and unaccounted for. The solution would be to let the submitter know that their document is flagged as suspicious so that they can follow up with OPC and/or resubmit.
- · Accessibility requirements are not met. By April 2026 the system will need to ensure it is compliant with DOJ rules for accessibility.

Schedule Summary

The original schedule estimated completion of the project for July 2020. However, due to circumstances outside the control of the State and Vendor, the project experienced significant delays and multiple restarts. These circumstances included a pause due to the COVID-19 pandemic and 2 floods, one in 2023 and one in 2024. These events redirected state staff to address the emergency events and put the project on hold until resources were available to work on the project. The most recent re-baseline of the project schedule planned for a 7/1/2025 completion. The project further experienced a delay in deployment due to unexpected defects in the system and finally went live on 7/21/2025 with a rolling onboarding schedule for state agencies and departments to begin using the system. Additional scope was delivered in the Fall 2025 with the completion of workflow enhancements related to purchase requisitions, invoicing, sourcing, contracting, waivers and the PAT approval process completed in November and December 2025. The project closeout, originally scheduled for 12/31/2025, was delayed allowing BGS more time to negotiate a long-term maintenance & operations agreement with KPMG. Currently, closeout is scheduled for 1/31/2026

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$8,587,093	$8,587,093	**OVER BUDGET**

Total Original Estimated Operating Cost	Total Current Estimated State Operating Cost	Budget Status – Over or Under Budget
$1,785,000	$1,785,000	**OVER BUDGET**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$10,372,093	$10,372,093	**OVER BUDGET**
Solution Lifecycle Years	5	

Schedule Variance chart and Budget to Actuals Chart

AOA - BGS - VTBuys Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

1,280

Initial Estimate to Current Baseline

% Over Schedule

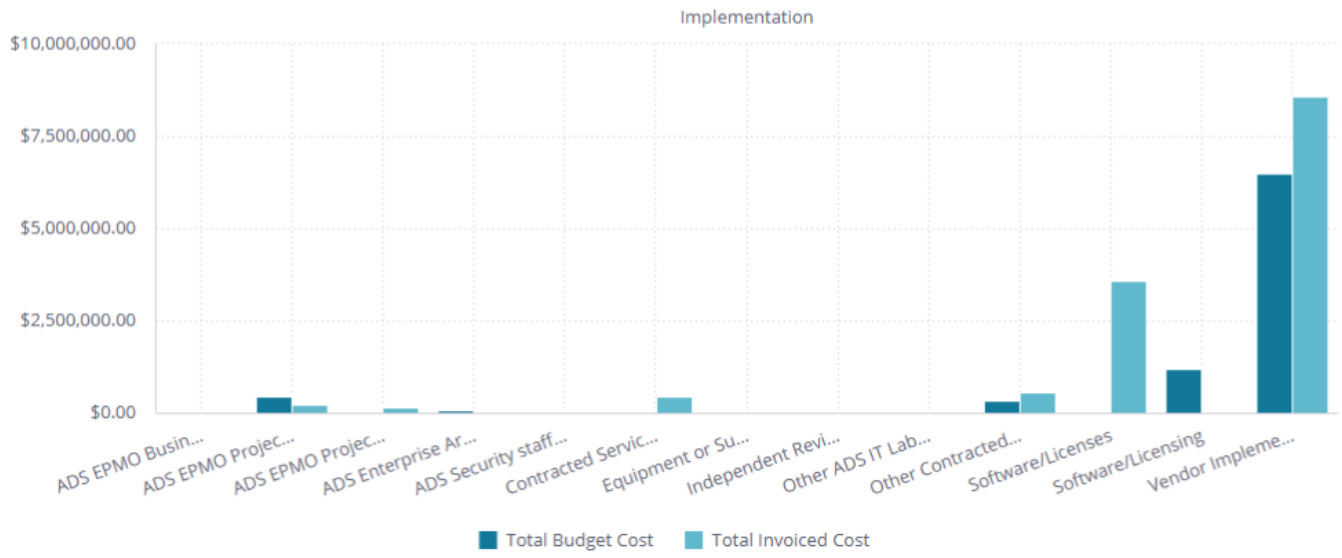
244%

Schedule Estimates

AOA - BGS - eProcurement (VTBuys) Budget Summary

Actual Project Costs through September 2024

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AOA - BGS - Workplace Information System (WIMS)				
Agency/Department	Agency of Administration (AOA) Buildings and General Services		**Current Project Phase**		Execution
Original Project Start Date	12/19/2019	**Original Project Estimated End Date**	3/28/2026	**Number of Change Orders Approved**	27
Actual Start Date	2/28/2021	**Current Estimated End Date**	3/28/2026		
Project	**Status**		**Update**		
Scope	**ON TRACK**		The scope of the WIMS project is stable. With the exception a custom integration to pull in financial data, there is no indication that changes to project scope are expected. While not a current risk to the WIMS project, construction management software will be coming on line at a future date and will require integration with the new WIMS system.		
Schedule	**NEEDS LEADERSHIP INTERVENTION**		While progress in the WIMS project has been steady, it has been impacted by availability of internal stakeholders. Discovery of functionality when building custom integrations has also caused internal stakeholders to consider how we might better integrate systems that were not originally considered necessary to have WIMS functioning fully. This applies primarily to importing financial data into BGS projects that are managed in WIMS.		
Budget	**ON TRACK**		Project costs are aligned with calculations as depicted in the IT ABC form. Funds allocated specifically for custom integration development is limited but expected to be sufficient for the work that is currently in progress. Additional integrations, if deemed necessary, may require additional allocations for custom development.		
Overall	**ON TRACK**				
Scope Summary					

The purpose of implementing the Workplace Information Management System (WIMS) to be able to understand the full life-cycle of BGS assets through documenting, compiling and analyzing facility conditions, maintenance activities, space usage and other data points to make informed decisions about capital investment, space allocation, and the general management of all our workspaces. As implementation of planned modules continues, custom integrations related to financial information may have their scope impacted by concurrent projects at the state.		
Schedule Summary		
The project was initiated in December of 2019 and is projected to wrap up in the second quarter of 2026. Implementation and custom development complexity as well as personnel availability have all impacted the original projected completion of 12/2024.		
Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$2,781,671.14	$2,781,671.14	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$814,040.89	$814,040.89	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$3,595,712.03	$3,595,712.03	**ON TRACK**
Solution Lifecycle Years	5	

Schedule Variance Chart & Budget to Actuals Chart

BGS WIMS Schedule Variance

Last refreshed Nov 24 2:

BGS WIMS Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

1,013

Initial Estimate to Current Baseline

% Over Schedule

388%

Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Initial Estimated Project Start-Finish Dates	Initial Estimate	3/29/21	3/28/22	Initial Schedule Estimate
Baseline Schedule at Contracting	Baseline at Contracting	3/29/21	3/28/22	Baseline at Contracting
Estimate at Contract Amendment 3	Baseline 3	3/29/21	3/30/26	Baseline after Amendment 3
Estimate at Contract Amendment 1	Baseline 2	3/29/21	3/30/26	After additional review of module implementation and assessing the need for custom integrations, contract Amendment #1 was written to include additional costs for custom integration development and to extend the implementation schedule.

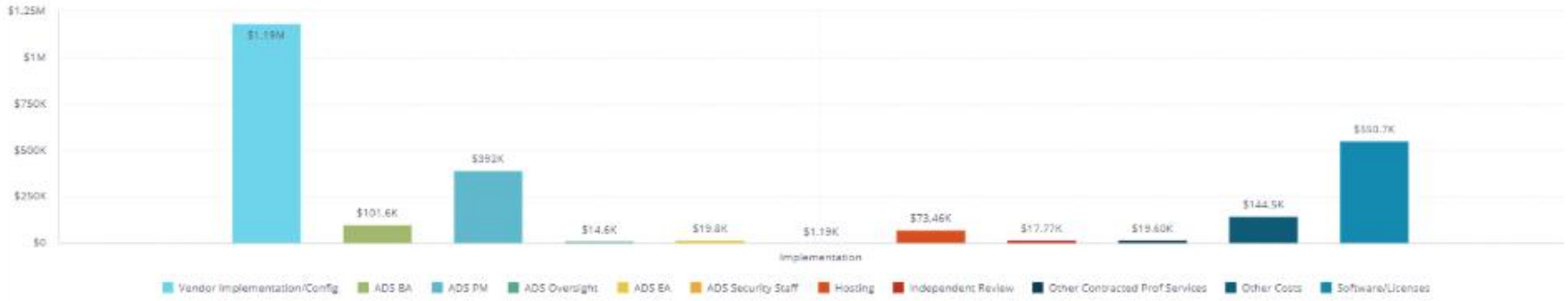
BGS WIMS Budget Details

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs

Cost Category*	Cost Type*	Total Budget Cost	Total Invoiced Cost	Budget Remaining	% Budget Remaining
Implementation	ADS Enterprise Architect Staff for Implementation	$22,176.00	$19,800.00	$2,376.00	10.71%
	ADS EPMO Business Analyst for Implementation	$252,846.00	$101,557.50	$151,288.50	59.83%
	ADS EPMO Project Manager for Implementation	$446,943.20	$392,035.20	$54,908.00	12.29%
	ADS EPMO Project Oversight & Reporting	$22,418.00	$14,608.00	$7,810.00	34.84%
	ADS Security staff for Implementation	$3,564.00	$1,188.00	$2,376.00	66.67%
	Hosting	$73,462.40	$73,462.40	$0.00	0.00%
	Independent Review	$17,769.00	$17,769.00	$0.00	0.00%
	Other Contracted Professional Services for Implementation	$19,598.00	$19,598.00	$0.00	0.00%
	Other Costs	$440,624.51	$144,483.20	$296,141.31	67.21%
	Software/Licenses	$557,736.17	$550,736.17	$7,000.00	1.26%
	Vendor Annual Maintenance/Service Costs	$106,175.22	$106,175.22	$0.00	0.00%
	Vendor Implementation/Installation/Configuration	$818,358.64	$635,924.38	$182,434.26	22.29%
Grand Total		$2,781,671.14	$2,077,337.07	$704,334.07	25.32%

Actual Implementation Costs by Cost Type



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AOA - Enterprise Resource Planning (ERP)				
Agency/Department	Agency of Administration (AOA)		**Current Project Phase**		Execution
Project Sponsor	Sarah Clark/Denise Reilly-Hughes				
Original Project Start Date	11/1/2021	**Original Project Estimated End Date**	10/1/2025	**Number of Change Orders Approved**	0
Actual Start Date	1/9/2025	**Current Estimated End Date**	10/1/2028		

Project	Status	Update
Scope	**MANAGEABLE RISKS**	The status of the scope of the project has manageable risk. At this stage, the risk level remains manageable. However, it is important to note that the testing scope and validation planning are contingent upon the readiness of configurations across various workstreams. We are closely monitoring potential delays, which may necessitate adjustments to the project scope or a resequencing of testing activities. To maintain alignment and ensure readiness for upcoming milestones, it is crucial to achieve clarity on the current status of configurations.
Schedule	**NEEDS LEADERSHIP INTERVENTION**	Ongoing configuration delays are impacting the timing and preparation for Unit Testing. These delays, compounded by dependency issues, necessitate further updates to our overall schedule. The lack of transparency regarding configuration status is hindering our ability to develop a credible and detailed recovery plan. As a result, future milestones will continue to be adjusted until we can validate configuration status and resolve existing dependencies. We are actively working to address these issues.
Budget	**ON TRACK**	The baseline budget for the ERP implementation project has been established at $53.3 million with $8,865,045.70 spent through August 2025.
Overall	**NEEDS LEADERSHIP INTERVENTION**	

Scope Summary

The State of Vermont is embarking on a transformative journey to replace its existing Human Capital Management system, CGI Vantage Budget system, and Finances VISION system. These systems, which are currently running on outdated mainframes, have reached the end of their life cycle. The State recognizes the need for a modern Enterprise Resource Planning (ERP) system that can meet the evolving needs of its departments and agencies. The goal of this project is to implement a

brand new, modern ERP system that will bring about significant improvements in various areas. The State will embark on a business process transformation effort to improve processes and procedures for the implementation of a new ERP system. One of the key benefits will be enhanced customer service. The new system will provide a more user-friendly interface and improved functionality, enabling better service delivery to employees, managers, and other stakeholders. Employee self-service capabilities will empower individuals to access and manage their own information, reducing administrative burdens and improving overall efficiency. Reporting metrics will also be greatly improved with the implementation of the new ERP system. The system will provide real-time, accurate data that can be easily accessed and analyzed. This will enable better decision-making, strategic planning, and performance monitoring across departments and agencies. The State will have a comprehensive view of its financial and human capital data, allowing for more informed and data-driven decision-making. Data quality will be a key focus of the ERP project. The new system will ensure data integrity, accuracy, and consistency. By centralizing and automating various processes, the State will reduce the risk of errors and improve overall data quality. This will lead to better compliance, financial transparency, and accountability. Additionally, the implementation of the new ERP system will allow the State to sunset various on-premise, high-cost environments currently operational in its Data Centers. By moving to a modern, cloud-based infrastructure, the State will achieve cost savings, improved scalability, and enhanced security. This will free up resources that can be redirected towards other critical areas. In conclusion, the implementation of a new ERP system marks a significant milestone in the State of Vermont's journey towards modernization. By replacing outdated systems and embracing a modern, cloud-based infrastructure, the State is poised to improve customer service, reporting metrics, employee self-service, and data quality. This transformation will position the State for future success and enable better service delivery to its employees and stakeholders.

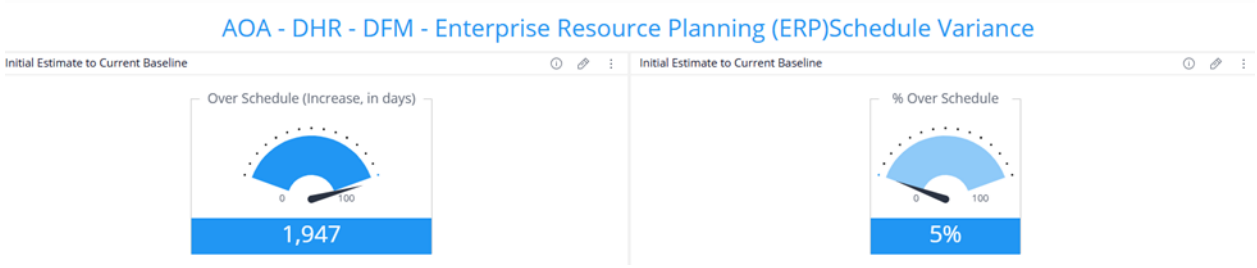
Schedule Summary

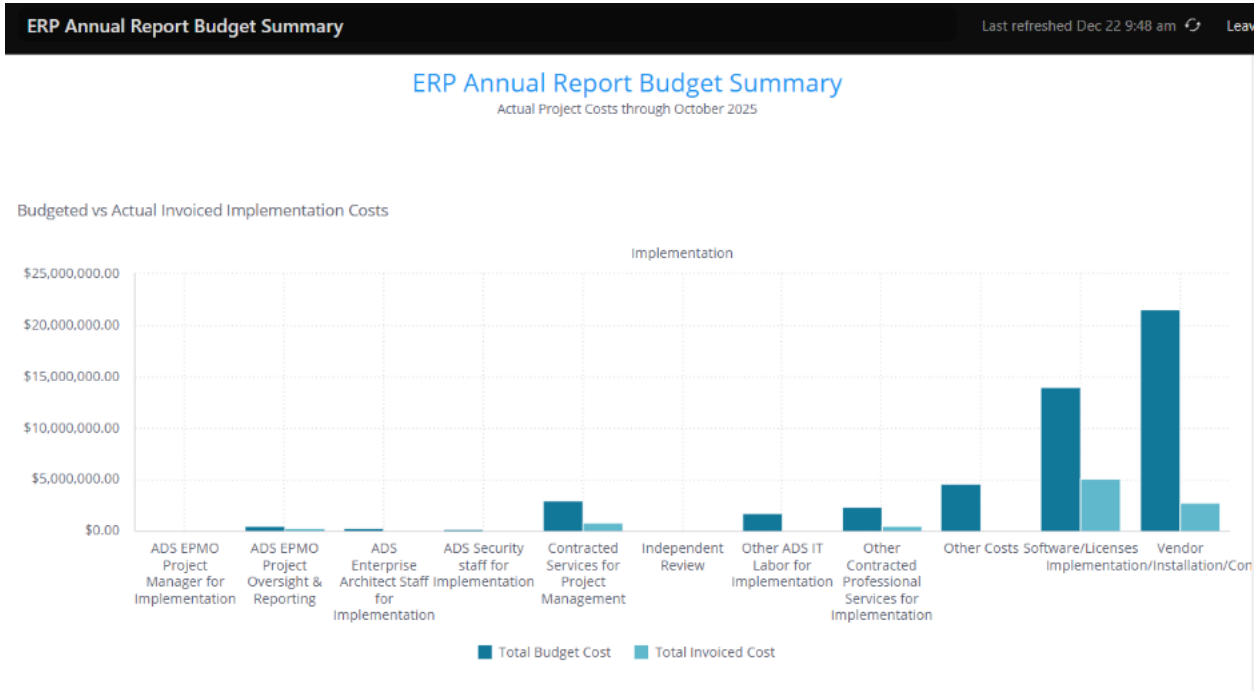
The ERP project is a multi-year initiative structured into two phases. Phase 1 focuses on the HCM Deployment, which is currently in the Architect and Configure phase. The go-live for HCM is scheduled for Summer 2026. Phase 2 will focus on the Financials implementation, scheduled to begin in Fall 2026 with an anticipated go-live in Summer 2028. The project as a whole is designed to modernize and integrate statewide systems through a coordinated, multi-year approach, ensuring a streamlined transition across all workstreams.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$45,050,066.78	**$48,204,422.78**	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$4,450,831.41	**$23,011,043.07**	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$49,500,898.19	**$71,215,465.85**	**ON TRACK**
Solution Lifecycle Years	5	

Schedule Variance Chart and Budget to Actuals Chart





IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AOA - Tax - Scanning, Capture, Imaging 2.0				
Agency/Department	Agency of Administration (AOA) Department of Taxes		**Current Project Phase**		Execution
Original Project Start Date	1/25/2022	**Original Project Estimated End Date**	1/26/2026	**Number of Change Orders Approved**	0
Actual Start Date	3/3/2023	**Current Estimated End Date**	1/26/2026		
Project	**Status**		**Update**		
Scope	**ON TRACK**		The baseline scope includes the replacement of the current scanning systems software that supports paper returns, payments and remittance processes.		
Schedule	**ON TRACK**		The last of the four phases is scheduled to go live on January 12, 2026,		
Budget	**ON TRACK**		The baseline project budget has an implementation cost of $2,204,520.00.		
Overall	**ON TRACK**				

Scope Summary

The Tax Department of the State of Vermont is modernizing its operations by replacing its outdated scanning system software, which has been in use for over 20 years. This initiative aims to enhance efficiency and effectiveness by developing four key components: • Document Capture will digitize paper returns, payments, and remittances, reducing manual data entry and errors, and speeding up processing. • Check Processing will automate the handling of checks, improving verification, depositing, and reconciliation processes to save time and resources. • Conversion will digitize existing paper documents, improving accessibility and reducing reliance on physical storage. • Content Management will create a centralized repository for all digital records, enhancing document retrieval, search, and sharing capabilities. Overall, this new scanning system will streamline processes, improve efficiency, and enhance tax administration, positioning the department for future success and better service to taxpayers.

Schedule Summary

Upon completion of vendor selection and contracting, a four Phase implementation schedule has been established. Phase 1 focused on vouchers, appeals, sales and use tax, meals and rooms tax, and both quarterly and annual withholding tax. It was successfully launched into production on August 20, 2024, Phase 2 focused on personal income tax, homestead declarations and renter credit claims. Go live date was 1/15/2025. Phase 3 addressed fiduciary income tax, estate tax, business tax account applications, property transfer tax, real estate withholding and uniform capacity tax. Released to production 7/8/25. Phase 4 (active) will handle checks

without initiating forms, return mail, correspondence without initiating forms, corporate income tax, business income tax and current use. Go live for the final phase targeted for 1/12/26.		
Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$2,204,520.00	$2,204,520.00	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$1,231,565.00	$1,231,565.00	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$3,436,085.00	$3,436,085.00	**ON TRACK**
Solution Lifecycle Years	**5**	

Schedule Variance and Budget to Actuals Charts

AOA Tax Scanning Capture Imaging Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

0

Initial Estimate to Current Baseline

% Over Schedule

0%

Schedule Estimates

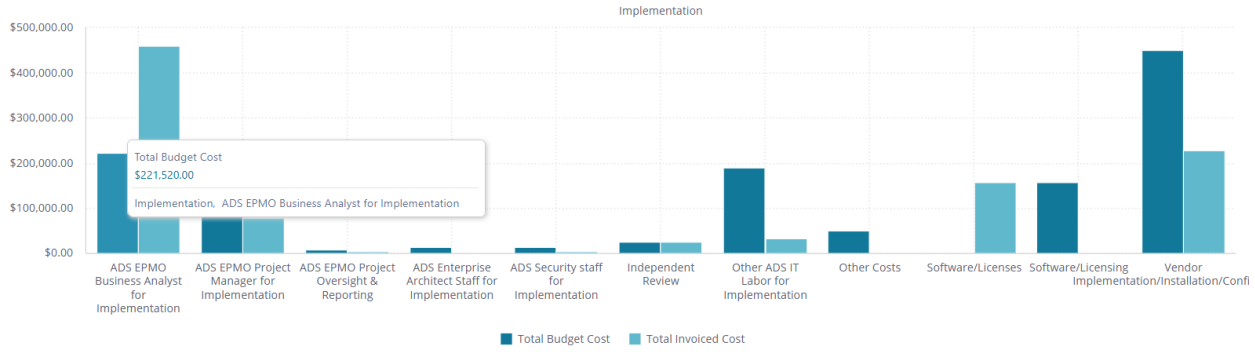
Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Estimate at Contracting	Baseline at Contracting	1/25/22	1/2/26	Project Version 2.0

Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs

Clear Selection



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AOA - Tax - Vermont Property Information Exchance (VTPIE)				
Agency/Department	Agency of Administration (AOA) Department of Taxes		**Current Project Phase**		Execution
Original Project Start Date	4/6/2020	**Original Project Estimated End Date**	9/30/2025	**Number of Change Orders Approved**	5
Actual Start Date	4/1/2020	**Current Estimated End Date**	9/30/2025		
Project	**Status**		**Update**		
Scope	**MANAGEABLE RISKS**		**Project scope has been relatively stable with regard to major deliverables. In some cases, however, there have been discussions regarding requested functions being out of scope as a result of requirements being vague and broad in some cases.**		
Schedule	**NEEDS LEADERSHIP INTERVENTION**		**The project schedule currently at risk and a contract amendment to extend the implementation schedule is in process. Delays throughout the life of the project have caused a cascade of incomplete tasks to accumulate. Internal stakeholders are currently engaging with the vendor to determine how to ensure satisfactory delivery of all contractual obligations.**		
Budget	**ON TRACK**		**Project costs have remained aligned with original estimates. Invoices are monitored closely by the project sponsor and business lead to ensure payment milestones are aligned with predicted costs.**		
Overall	**NEEDS LEADERSHIP INTERVENTION**				
Scope Summary					
The State is required to maintain a statewide education grand list for the purposes of education property taxation, collecting Grand List data from each municipality. The VTPIE project aims to modernize processes, technology and tools to enable more efficiency creation and use of the grand list.					
Schedule Summary					

The original project scheduled estimated that implementation of new modules would take place from 2019 through 2022 with hosting, support and maintenance continuing through 2025. A contract amendment to extend the schedule for implementation. While this does not change the volume or scope of work, it ensures that both parties are following best practices while completing the implementation work.		
Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$2,428,473.55	$2,428,473.55	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$1,005,757.00	$1,005,757.00	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$3,434,230.55	$3,434,230.55	**ON TRACK**
Solution Lifecycle Years	**5**	

Schedule Variance and Budget to Actuals Chart

AOA - Tax - VTPIE Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

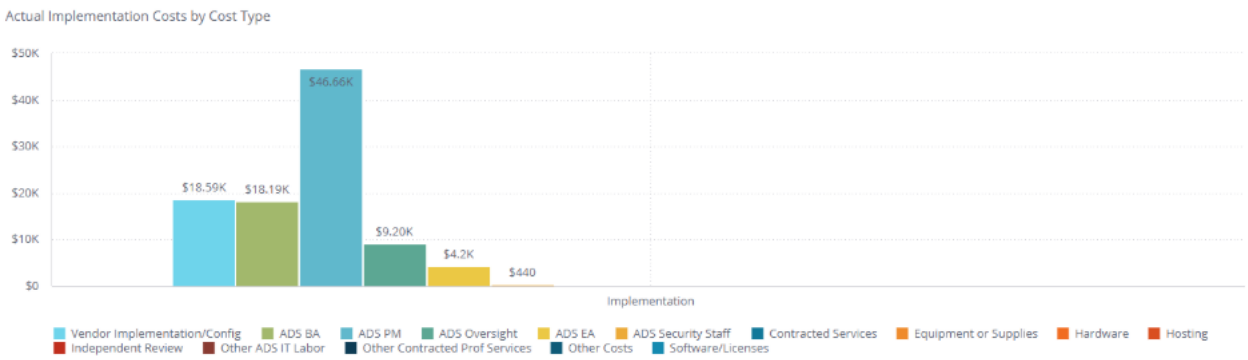
102

Initial Estimate to Current Baseline

% Over Schedule

#N/A

Schedule Estimates



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AOA - Vermont Business Portal				
Agency/Department	Agency of Administration (AOA)		**Current Project Phase**		Closing
Original Project Start Date	10/1/2024	**Original Project Estimated End Date**	8/14/2025	**Number of Change Orders Approved**	0
Actual Start Date	9/12/2024	**Current Estimated End Date**	8/14/2025		
Project	**Status**		**Update**		
Scope	**ON TRACK**		The scope is limited for the first iteration of the website. The initial scope is to connect potential business owners with State resources from SOS, VDOL, Tax, and ACCD. The scope has not changed since the initial discussions with business partners.		
Schedule	**ON TRACK**		There was no executed ITABC form for this project, however the ADS IT Service Request approval form estimated the cost of this initiative to be $135,960.00 The project was completed well within the estimated budget, coming in approximately $98,946 under budget. Costs primarily involved ADS Resource Supports, with work conducted internally by the project team and business leaders from ACCD, VDOL, TAX, and SOS, along with our partner vendor, Tyler Technologies. Only internal ADS Resource costs were accounted for in this initiative. Current actual project costs are based on hours billed or coded to the VTBIZPORT TPID through August 1, 2025, totaling $36,134. The Total Actual Costs identified for this project in this Close Out Report, of $37,014.00, includes an estimate for an additional 10 hours needed to complete project close-out tasks, such as lessons learned surveys,		

		drafting and finalizing the close-out report, and ensuring its full execution.
Budget	**ON TRACK**	This project completed within the estimated and approved preliminary budget.
Overall	**ON TRACK**	

Scope Summary

The scope of this project is to build a business navigator (checklist) for potential business owners to connected with the appropriate State resources to assist them with starting a business in Vermont. The plan is to establish and launch a centralized website for users to access information associated with multiple state agencies across Vermont, to include, the Secretary of State, Vermont Department of Labor, Vermont Department of Tax, and ACCD. This project completed within the originally intended scope.

Schedule Summary

This project completed on time with the Go/No Go decision for "go live" taking place on June 27, 2025. The public portal was launched on July 7, 2025.

Budget Summary

Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$140,580.00	$140,580.00	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
	0	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
	$140,580.00	**ON TRACK**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

AOA Business Portal Schedule Variance Last refreshed De

AOA Business Portal Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

0

Initial Estimate to Current Baseline

% Over Schedule

#N/A

Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Updated Scheduled - Holiday Staff Outtages	Baseline 2	11/21/24	7/31/25	Staff out of offices for the July 4th holiday, delayed deployment of the portal to go-live slightly. Go Live took place on 7/7/25, and close out are underway.

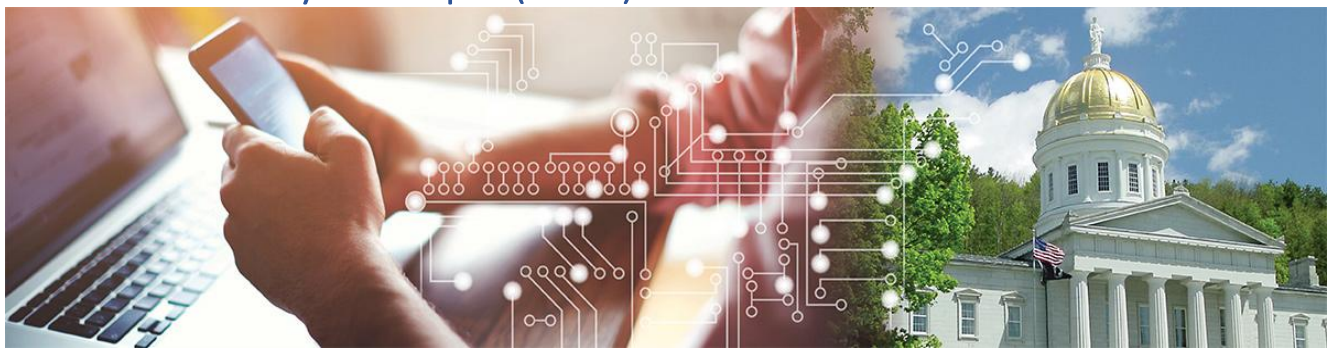
AOA Business Portal Better Budget Details

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs

Cost Category*	Cost Type*	Total Budget Cost	Total Invoiced Cost	Budget Remaining	% Budget Remaining
Implementation	ADS Enterprise Architect Staff for Implementation			$0.00	
	ADS EPMO Business Analyst for Implementation	$26,400.00	$7,414.00	$18,986.00	71.92%
	ADS EPMO Project Manager for Implementation	$17,600.00	$16,204.00	$1,396.00	7.93%
	ADS EPMO Project Oversight & Reporting	$8,800.00		$8,800.00	100.00%
	ADS Security staff for Implementation			$0.00	
	Other ADS IT Labor for Implementation	$87,780.00	$12,516.00	$75,264.00	85.74%
Grand Total		$140,580.00	$36,134.00	$104,446.00	74.30%

Actual Implementation Costs by Cost Type



Agency of Commerce and Community Development (ACCD)

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	ACCD Grants Management Solution				
Agency/Department	Agency of Commerce and Community Development (ACCD) Department of Economic Development (DED)","Department of Housing and Community Development (DHCD)		**Current Project Phase**		Execution
Original Project Start Date	9/1/2022	**Original Project Estimated End Date**	12/31/2026	**Number of Change Orders Approved**	5
Actual Start Date	7/18/2024	**Current Estimated End Date**	12/31/2026		
Project	**Status**		**Update**		
Scope	**ON TRACK**		The project team has contracted with Agate to implement their grants management IGX application replacing the current IntelliGrants 16 version to meet the scope defined by the Department of Economic Development (DED) and the Department of Housing and Community Development (DHCD).		
Schedule	**ON TRACK**		Implementation Phase 1 started in August 2024, focusing on Municipal Planning Grants (MPG). Phase 2 will start in January 2025 and includes implementation of the Vermont Employment Growth Incentives (VEGI), Vermont Training Program (VTP), and the Vermont Community Development Program (VCDP) grants. Phase 3 is planned to commence in June 2025 to complete implementation of the VCDP grant program by December of 2026.		
Budget	**ON TRACK**		The project budget is currently baselined at $1,181,661.48. Actual project costs through October 2025 $609,011.		
Overall	**ON TRACK**				
Scope Summary					

The State of Vermont is undertaking a significant upgrade to its grant management processes by transitioning from AGATE's IntelliGrants v16 to the more advanced IGX grants management application. This initiative focuses on enhancing the management of key programs, including the Vermont Community Development Program (VCDP), Vermont Training Program (VTP), Vermont Employment Growth Incentive (VEGI), and the Municipal Planning Grant (MPG) programs. The primary goal is to provide the Agency of Commerce and Community Development (ACCD) with a comprehensive and efficient grants management system.

The migration to the IGX application will offer the ACCD a suite of advanced tools designed to streamline the processing of both current and future grants. This transition will ensure effective management of the aforementioned programs by providing features tailored to their unique requirements. The new system will facilitate efficient handling of grant applications, fund disbursement, and project monitoring.

The implementation will adhere to design documentation approved by the ACCD, ensuring alignment with the agency's specific needs and workflows. This careful planning will guarantee a seamless transition and optimal use of the new software. The IGX application promises a modern, user-friendly interface, improved data management, and enhanced reporting capabilities, ultimately reducing administrative burdens and supporting better decision-making and oversight.

Schedule Summary

The initial IT ABC Form was submitted in July 2021 with an estimated go-live date of January 2024. Due to extended vendor proposal review and contracting activities, the start of the execution phase was delayed until August 2024. The current project schedule has an estimated project end date of September 2026.

Budget Summary

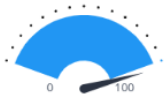
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$1,181,661.48	$1,246,730.71	ON TRACK
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$138,200	$138,200	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$1,319,861.48	$1,384,930.71	ON TRACK
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Chart

ACCD - (GMS) Grants Management Solution - Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)



358

Initial Estimate to Current Baseline

% Over Schedule

35%

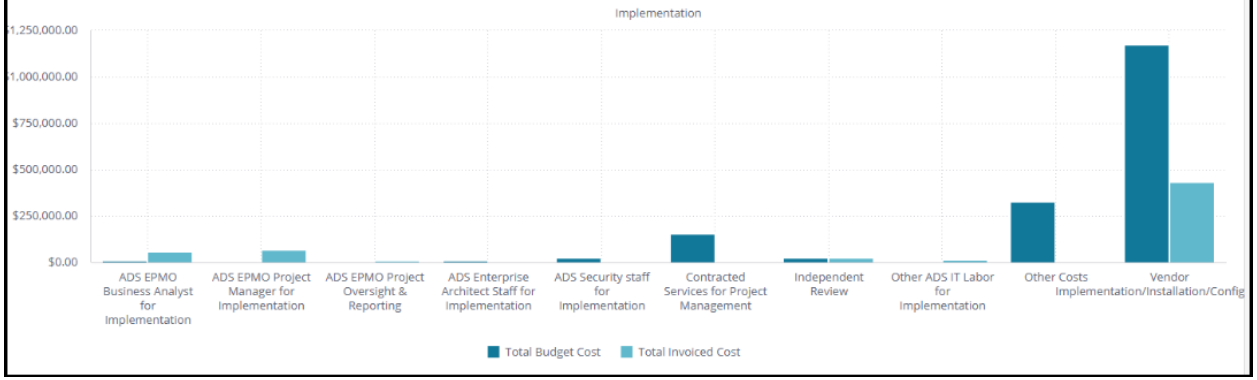
Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Baseline 2 Change Request #1	Baseline 2	7/12/21	7/1/24	Development of modules are rearranged from original schedule. End date is not changes
Baseline 3 Change Request #2	Baseline 3	7/12/21	12/1/26	Approved Change Request ADS Labor Charge 6.21.25, New End date of 12/1/26.
Baseline 4 Change Request #3	Baseline 4	7/12/21	12/1/26	Approved Change Request ADS Labor Charge 10.7.25 (reallocate labor hour from unused labor lin
Estimate at Contracting Project Start-Finish Dates	Baseline at Contracting	7/12/21	7/1/25	Baseline at Contracting, Vendor contract approved with a rebasedlined schedule.
Initial Estimated Of Project Start-Finish Dates	Initial Estimate	7/12/21	12/31/21	Initial Estimate, IT ABC Form Approved 7/16/2021
	Planning Estimate	7/12/21	3/31/25	Planning Estimate, IT ABC Form Approved 3/24/2024
				Planning Estimate, IT ABC Form Approved 6/21/2024
			1/2/24	Planning Estimate, IT ABC Form Approved 9/20/2022

ACCD - (GMS) Grants Management Solution - Annual Report Budget Summary

Actual Project Costs through December 2025

udgeted vs Actual Invoiced Implementation Costs



Agency of Agriculture Food & Markets (AGR)

***No IT Activities dollars to report this year**

Agency of Digital Services (ADS)

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	ADS - Apptio				
Agency/Department	Agency of Digital Services (ADS)		Current Project Phase		Closing
Original Project Start Date	3/18/2024	Original Project Estimated End Date	8/29/2025	Number of Change Orders Approved	0
Actual Start Date	5/17/2024	Current Estimated End Date	8/29/2025		
Project	Status		Update		
Scope	ON TRACK		Following the project "Refresh", the scope has been identified with three phases called out. The project scope was cancelled before the full implementation of Phase 3 - Cloudability.		
Schedule	ON TRACK		After initial implementation efforts of Apptio were stymied by the Implementation sub-contractor, the project team had been working directly with Apptio to complete the basic Apptio functionality implementation before then turning to begin work on the additional functionality offered by the Apptio suite of products that was already paid for. With the cancellation of the project, the schedule is no longer of any concern.		
Budget	ON TRACK		With the Project JumpStart, the only budgetary concerns are labor costs, but the project team and stakeholders are actively reviewing these costs to ensure project success. The actual project costs totaled $862,363.90, the vast majority of which was Apptio License Fees ($783,691.90) and ADS labor costs ($78,972.00).		
Overall	ON TRACK				
Scope Summary					
The Apptio Business Office Budget System Project is a key initiative aimed at transforming budgetary processes for Vermont's Business Office Department. This project seeks to implement a comprehensive and robust budget management system to enhance efficiency, accessibility, and effectiveness in managing the State of Vermont's budgets and financial reporting.					

The new system will replicate existing workflows and processes, allowing the Business Office to manage workloads efficiently, track progress, and ensure timely completion of budgetary reports. Additionally, the project will expand the capabilities of the budget and vendor management system, tailoring it to the department's specific needs and enhancing reporting and oversight capabilities.

By adopting this comprehensive system, the Business Office aims to improve collaboration, streamline processes, and increase transparency. The system will ensure that all relevant information is easily accessible and well-organized. Features such as Vendor Management and Cloudability will facilitate efficient tracking of budgetary processes and vendor relations, while enhancing inter-departmental communication to promote transparency and accountability. Robust reporting capabilities will provide valuable insights for analysis and decision-making.

Overall, the Apptio Budget Management System Project represents a significant advancement in streamlining and enhancing state budgetary processes for Vermont's Business Office Department. This initiative underscores the department's commitment to delivering efficient and effective financial and budgetary services to the citizens of Vermont.

Schedule Summary

The Apptio JumpStart project was canceled by the project sponsor and executive stakeholders on 8/26/25. The project Close Out Meeting and Report have been held and collected, and the project is now considered closed.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$865,971.90	$865,971.90	ON TRACK
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
	0	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
	$865,971.90	ON TRACK
Solution Lifecycle Years	4	

Schedule Variance and Budget to Actuals Charts

Apptio Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

-188

Initial Estimate to Current Baseline

% Over Schedule

-100%

Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Baseline at Contracting Project Start-Finish Dates	Baseline at Contracting	3/18/24	4/30/25	Schedule dates and costs changed due to executed contract.
Initial Baseline	Initial Estimate	4/3/23	8/15/23	The initial baseline schedule for this project was not met, die to the e:

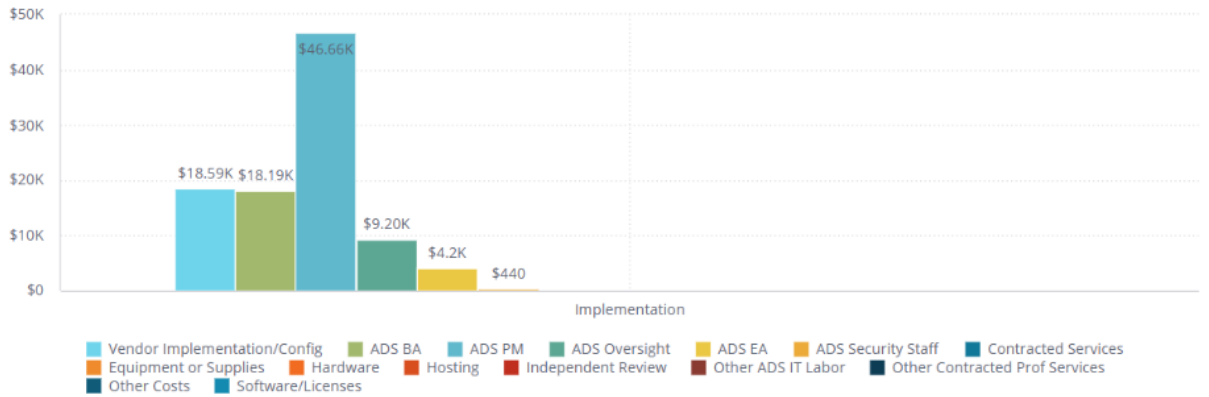
Apptio Project Budget Details

Actual Project Costs through December 2025

Budgeted vs Actual Invoiced Implementation Costs

Cost Category*	Cost Type*	Total Budget Cost	Total Invoiced Cost	Budget Remaining	% Budget Remai
Implementation	ADS EPMO Business Analyst for Implementation	$17,336.00	$8,448.00	$8,888.00	
	ADS EPMO Project Manager for Implementation	$45,760.00	$55,792.00	$-10,032.00	
	ADS EPMO Project Oversight & Reporting	$14,608.00	$3,740.00	$10,868.00	
	Other ADS IT Labor for Implementation	$4,576.00	$14,388.00	$-9,812.00	
	Vendor Implementation/Installation/Configuration	$783,691.90		$783,691.90	
Grand Total		$865,971.90	$82,368.00	$783,603.90	

Actual Implementation Costs by Cost Type



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	ADS Shared Services VoIP				
Agency/Department	Agency of Digital Services (ADS)		Current Project Phase		Closing
Original Project Start Date	3/20/2020	Original Project Estimated End Date	3/19/2025	Number of Change Orders Approved	3
Actual Start Date	1/1/2020	Current Estimated End Date	3/19/2025		
Project	Status		Update		
Scope	ON TRACK		While implementation of VoIP phones has reached completion, project scope was impacted by the widely adopted use of MS Teams, resulting in fewer required VoIP phones. All project activities have been completed except for work related to E911 compliance.		
Schedule	ON TRACK		While implementation of all project deliverables was expected to be completed by the fourth quarter for calendar year 2024, some change in scope and unexpected complexity in E911 implementation have caused delays. All project activities have been completed except for work related to E911 compliance.		
Budget	ON TRACK		Final cost of the project through January 2025 was approximately $346,000 with 32% of the overall budget remaining.		
Overall	ON TRACK				

Scope Summary

The State of Vermont is undertaking a strategic upgrade of its Enterprise Voice over Internet Protocol (VoIP) platform, which currently supports 6,500 users and is managed by the Agency of Digital Services (ADS) Shared Services Division. In partnership with NWN Carousel, the State aims to replace its existing VoIP platform to comply with the new E911 Rule and optimize the use of existing Internet Protocol (IP) Telephony hardware.

The primary objectives of this initiative include:

- Cost Savings: The project aims to leverage cost efficiencies in the new VoIP system.
- Compliance: Ensuring the VoIP system adheres to the newly passed E911 Rule.

- **Customer Service Improvement: Enhancing the accuracy and efficiency of service operations, including moves, adds, changes, and deletes.**
- **Improved Reporting Capabilities: Providing greater flexibility in generating reports necessary for billing and other operational needs.**
- **Enhanced Call Detail Access: Offering detailed long-distance call information and enabling users to query call details through a self-service portal.**
- **Billing Code Information Accuracy: Ensuring precise billing code data to improve financial management.**

This upgrade represents a significant step forward in enhancing the State's telecommunications infrastructure, focusing on compliance, cost savings, and improved service delivery. By implementing these changes, the State of Vermont is committed to providing efficient, reliable, and compliant communication services to its users.

Schedule Summary

With the exception of E911, which is estimated to be implemented early in calendar year 2025, project deliverables were completed on schedule.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$512,456	$512,456	ON TRACK
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$4,588,455	$4,588,455	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$5,100,911	$5,100,911	ON TRACK
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

ADS - Shared Services - VOIP Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

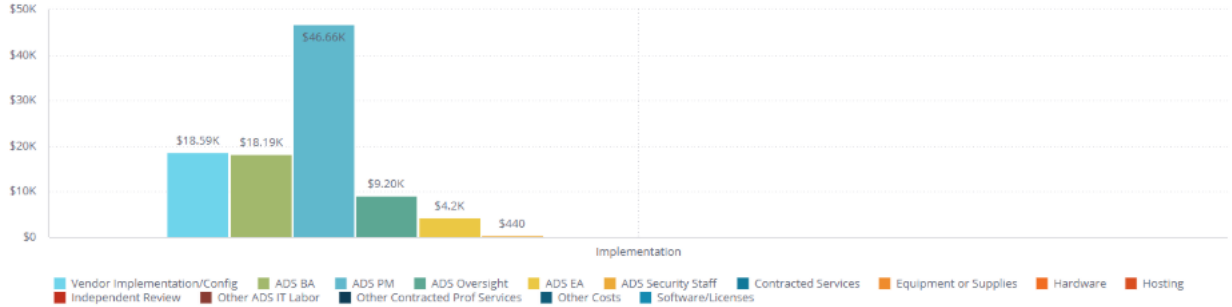
0

Initial Estimate to Current Baseline

% Over Schedule

#N/A

Actual Implementation Costs by Cost Type



Agency of Education (AOE)

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AOE - Education Quality - Educator Licensing System (ELS)				
Agency/Department	Agency of Education (AOE)		**Current Project Phase**		Execution
Original Project Start Date	8/9/2018	**Original Project Estimated End Date**	12/15/2025	**Number of Change Orders Approved**	0
Actual Start Date	9/12/2023	**Current Estimated End Date**	12/15/2025		
Project	**Status**		**Update**		
Scope	**ON TRACK**		The baseline scope includes the replacement of the existing licensing system with a Software as a Service solution that will be used by AOE, educators, and school districts in the State. All existing integrations are maintained.		
Schedule	**ON TRACK**		We are in the closure phase of the project. The project was initiated on July 1, 2020, the vendor contract was executed on September 1, 2023, and go live was July 15, 2025.		
Budget	**ON TRACK**		Date change initiated by AOE resulted in an increase to the project of $182,260, of which $137,500 extended support for the legacy system by the vendor Aithent.		
Overall	**ON TRACK**				

Scope Summary

The State of Vermont is enhancing its educator licensing and management process by implementing a comprehensive solution. Initially considering OnBase and Salesforce, the State has decided to open the request for proposals (RFP) to include Commercial Off The Shelf (COTS) solutions, allowing for a broader selection of options. This new system will streamline the issuance and renewal of educator licenses, reducing administrative burdens and improving turnaround times. It will also track continuing education requirements, ensuring educators meet professional development obligations. Additionally, the solution will manage licensing enforcement cases, providing tools to document and address any violations, thus maintaining the integrity of the education system. The system will integrate fee collection, simplifying the payment process for educators. Overall, this initiative aims to improve efficiency, compliance, and management within Vermont's educator licensing framework, demonstrating the State's commitment to enhancing its education system.

Schedule Summary

The RFP allowing Commercial Off The Shelf (COTS) software responses was released in September 2022. A letter of intent was issued in February 2023. Independent Review was completed in August 2023. The contract was signed September 1, 2023. Implementation, originally scheduled for go live in December 2024, has been postponed at AOE's request. A new date, was set for then end of the school year was chosen. The new Vermont Licensing System for Educators (VLS) launched on July 15, 2025.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$1,315,646.00	$1,315,646.00	ON TRACK
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$1,520,560.00	$1,520,560.00	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$2,836,206.00	$2,836,206.00	ON TRACK
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

AOE Educator Licensing Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

771

Initial Estimate to Current Baseline

% Over Schedule

161%

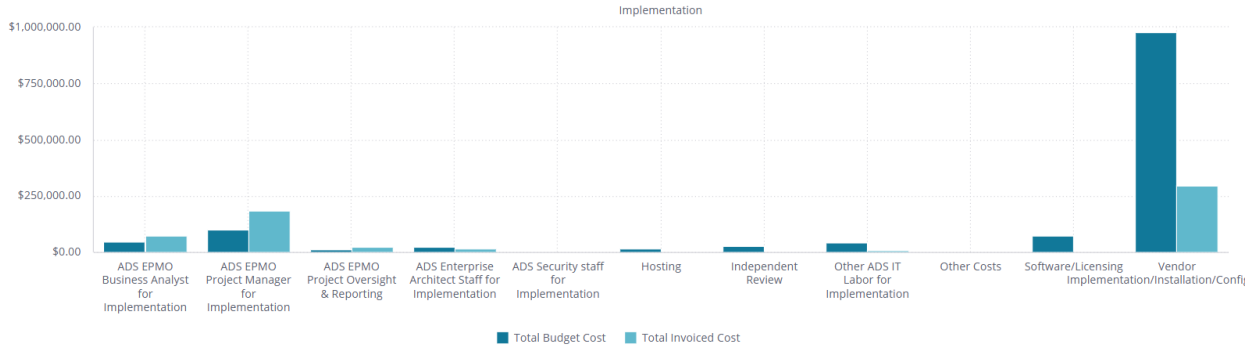
Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Baseline 5 - Change Request	Baseline 5	9/1/20	7/15/25	Go-live change request
Revised IT-ABC	Baseline 3	9/1/20	10/31/22	Reflects delayed start date
Estimate at Contracting -- Randa	Baseline 2	9/1/20	6/30/22	COTS option
Initial Estimated Project Start-Finish Dates	Baseline at Contracting	9/1/20	6/30/22	Salesforce option
Initial Salesforce Estimate	Initial Estimate	8/9/18	8/9/19	One year installation estimate

Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	**AOE - Child Nutrition Management System**				
Agency/Department	**Agency of Education (AOE)**		**Current Project Phase**		**Closing**
Original Project Start Date	**12/18/2018**	**Original Project Estimated End Date**	**5/30/2025**	**Number of Change Orders Approved**	**12**
Actual Start Date	**5/1/2020**	**Current Estimated End Date**	**5/30/2025**		
Project	**Status**		**Update**		
Scope	**ON TRACK**		**The baseline scope of this project includes all procurement sourcing and contracting events to include all associated change orders and amendments to the contract to date. The original project scope has been reduced significantly over the course of this project through multiple executed change orders and contract amendments.**		
Schedule	**NEEDS LEADERSHIP INTERVENTION**		**This project was not completed during its originally anticipated timeline. This was the result of multiple extraordinary circumstances such as the Covid-19 pandemic and office/business closures, reprioritization of other emergency efforts during the pandemic, as well as resource shortages, on both the vendor and the State sides of this project.** **The project implementation schedule was ultimately delayed from December 31, 2021 to March 12, 2025.**		
Budget	**MANAGEABLE RISKS**		**The initial ITABC form for this project was executed on December 3, 2018. However, due to contracting and negotiation delays the initial contract was not executed until September 2, 2020, which required an updated ITABC form with re-baselined figures.** **That updated ITABC form was executed on 8/10/2020, updating the estimated cost for implementation to $396,559.00.** **As the project progressed, additional resources and allocation challenges arose for project teams on both the state and vendor side,**		

		in addition to the necessary reprioritization resulting from the unforeseen covid 19- pandemic and the State's urgent response. These challenges play a significant role in schedule and timeline challenges, such as delays in requirements gathering from state resources, development on the vendor sides, and UAT amongst state resources. **Additionally, during requirements gathering it became evident that additional scope for various customized features was required in order to meet the State's desired outcome for this system, and the implementation and addition of these customized features came at an additional cost that was originally anticipated through the base-lined ITABC.** **Finally, it is important to note that as well as the inclusion of increased scope there were also instances in which scope was decreased over the life of the implementation with the vendor for this system, and as such costs for those requirements removed from scope were eliminated.** **Ultimately the implementation for this project came in higher than originally anticipated but that is based heavily on the project timeline extension of nearly 3 years to complete implementation.**
Overall	**NEEDS LEADERSHIP INTERVENTION**	
Scope Summary		
The Agency is committed to enhancing its Child Nutrition Management capabilities by replacing the existing system with a new and improved solution. The new system has already replaced the previous one and will offer expanded functionality once phase 2 is completed. The primary objective of this project is to provide a robust and efficient system that can accept and process program applications and claims for all School Nutrition Programs and Child and Adult Care Programs. The new system streamlines the application and claims processes, ensuring accuracy and efficiency in managing program enrollments and reimbursements. Additionally, the system is designed to manage data collections related to child nutrition programs. It provides a centralized platform for collecting and organizing data, ensuring compliance with USDA reporting requirements. This feature enables the Agency to accurately track program participation, meal counts, and other essential data points necessary for program evaluation and reporting. Furthermore, the new system offers comprehensive reporting capabilities. It generates reports that provide insights into program performance, financials, and compliance. These reports enable the Agency to monitor program effectiveness, identify areas for improvement, and ensure adherence to USDA regulations. Once phase 2 is		

completed, the new system will offer expanded functionality. This expansion will further enhance the management of child nutrition programs, providing additional features and tools to support program administrators, school staff, and other stakeholders involved in the programs. In conclusion, the replacement of the Agency's Child Nutrition Management System marks a significant milestone in improving the management of School Nutrition Programs and Child and Adult Care Programs. The new system, already implemented and set to offer expanded functionality in phase 2, streamlines program applications and claims, manages data collections, and provides comprehensive reporting. This project's successful completion ensures compliance with USDA requirements and enhances the Agency's ability to provide nutritious meals to children and adults in need.		
Schedule Summary		
This project has successfully completed.		
Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$396,559	$578,347.85	OVER BUDGET
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$665,000.00	$1,110,125.00	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$1,061,559.00	$1,688,472.85	OVER BUDGET
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

AOE CNP Schedule Variance

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Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

571

Initial Estimate to Current Baseline

% Over Schedule

108%

Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
00. Initial Estimated Project Start-Finish Dates	Initial Estimate	12/21/20	12/30/22	Original ITABC Executed on 12/21/2020, And the Vendor Contract was executed on 12/20/2022. There were no estimated project dates on this version of the ITABC form.
01. Original Contracted Project Start-Finish Dates	Baseline at Contracting	9/21/20	12/31/21	Vendor Contract was executed on 12/20/2022. Original contract term: 9/2/2020 - 6/30/2026. Implementation schedule: 9/20/2020-12/31/2021
05. Change Request #12 - Project-Start Finish Dates	Baseline 5	9/21/20	3/17/25	Change Order #12, extended the implementation schedule to March 12, 2025 and was executed on 3/17/2025. There was no impact to life of the contract.
04. Change Request #11 - Project-Start Finish Dates	Baseline 4	9/21/20	2/28/25	Change Order #11, extended the implementation schedule to February 28, 2028 and was executed on 2/11/2025. There was no impact to life of the contract.
03. Amendment #2 - Project-Start Finish Dates	Baseline 3	9/21/20	12/31/24	Amendment #2, extended implementation to the end of December 2024 and reduced scope of the project. 12/27/2023. There was no impact to life of the contract.
02. Amendment #1 - Project Start-Finish Dates	Baseline 2	9/21/20	12/29/23	Amendment #1, extended implementation to the end of December 2023. This was a result of change request #5, splitting implementation into two phases for partial system deployment. This amendment was executed on 2/23/2022.

AOE Child Nutrition Budget Details

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs

Cost Category*	Cost Type*	Total Budget Cost	Total Invoiced Cost	Budget Remaining	% Budget Remaining
Implementation	ADS Enterprise Architect Staff for Implementation	$31,768.00	$12,672.00	$19,096.00	60.11%
	ADS EPMO Business Analyst for Implementation	$128,196.00	$51,260.00	$77,936.00	60.82%
	ADS EPMO Project Manager for Implementation	$349,196.00	$254,472.00	$94,724.00	27.13%
	ADS EPMO Project Oversight & Reporting	$22,072.00	$6,028.00	$16,044.00	72.69%
	ADS Security staff for Implementation	$10,560.00	$1,100.00	$9,460.00	89.58%
	Independent Review	$75,000.00	$23,500.00	$51,500.00	68.67%
	Other ADS IT Labor for Implementation	$64,020.00	$28,938.00	$35,082.00	54.80%
	Other Contracted Professional Services for Implementation	$94,655.00	$14,654.50	$80,000.50	77.33%
	Other Costs	$75,054.50	$35,400.00	$39,654.50	52.83%
	Vendor Implementation/Installation/Configuration	$279,853.35	$68,591.50	$211,261.85	81.94%
Grand Total		$1,201,374.85	$496,616.00	$704,758.85	58.66%

Actual Implementation Costs by Cost Type

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AOE - Student Pathways - Dual Enrollment Voucher System				
Agency/Department	Agency of Education (AOE)		Current Project Phase		Execution
Original Project Start Date	4/25/2022	Original Project Estimated End Date	12/15/2025	Number of Change Orders Approved	3
Actual Start Date	7/18/2023	Current Estimated End Date	12/15/2025		
Project	Status		Update		
Scope	MANAGEABLE RISKS		The baseline scope includes all procurement, sourcing and contracting events regarding software to support the State's Dual Enrollment Program Voucher System which provides a way for students, voucher coordinators, and college administration to manage high school students enrolled in college courses including the eligibility, voucher creation, available college courses, and reporting necessary for colleges to seek reimbursement from the dual enrollment program.		
Schedule	MANAGEABLE RISKS		The two deployment releases, Dual Enrollment/Fast Forward and Early College are complete and available for use. Inclusion of this application in the myVermont identity management solution is underway. Flat file transfer for course catalogs and class information is being rolled out to each of the nine Vermont colleges. As of writing, one is complete. End dates for both are undetermined. just completed User Acceptance Testing and has been signed off by the AOE. It will be deployed by the vendor in an upcoming release cycle, users trained and the system ready for use in April. Code for APIs that will be used by the colleges will be released afterward. A contract change order reflecting the new date will be drafted.		
Budget	ON TRACK		The baseline budget for the implementation of this project with use of allocated ARPA funds is $337,095.25.		

Overall	MANAGEABLE RISKS	
Scope Summary		
The State of Vermont is enhancing its Dual Enrollment Program by developing new software to support the program's voucher system. This software will streamline the management of high school students taking college courses, benefiting students, voucher coordinators, and college administrators. Key features include eligibility verification to ensure only qualified students enroll, automated voucher creation for approved students, and access to a comprehensive list of available college courses. Additionally, the software will offer reporting tools for colleges to facilitate reimbursement processes. This initiative aims to improve efficiency, reduce manual work, and enhance the overall experience for all involved in the Dual Enrollment Program.		
Schedule Summary		
The project was initiated on December 1, 2021. The solution is being delivered in two phases. Initial release of code for Dual Enrollment/Fast Forward was done 5/31/24. Early College (including invoicing) functionality was released on 9/26/25. Integration with the myVermont identity management application and implementation of improved data transfer from the colleges to the state are both active.		
Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$385,577.53	$385,577.53	ON TRACK
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$570,039.27	$570,039.27	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$955,616.80	$955,616.80	ON TRACK
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

AOE Student Pathways - Dual Enrollment Vouchers Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

383

Initial Estimate to Current Baseline

% Over Schedule

182%

Schedule Estimates

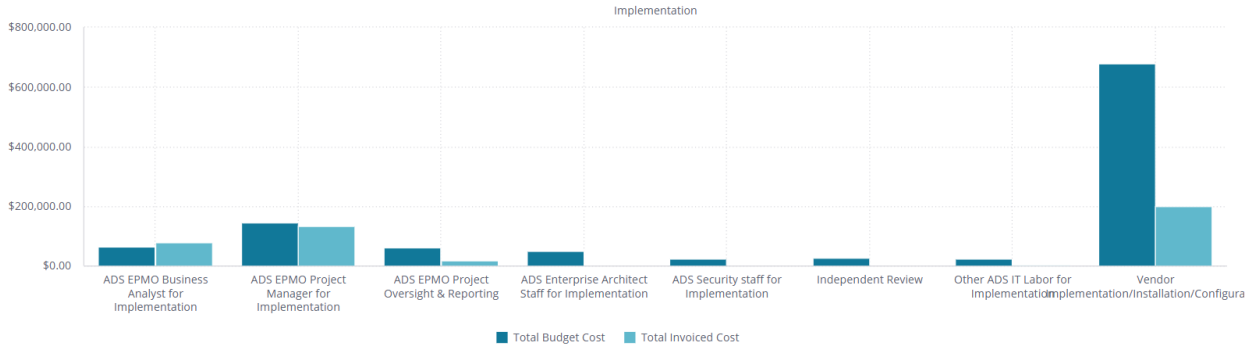
Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Baseline 2 (Change request)	Baseline 2	6/1/23	10/10/25	Change request extending implementation
Baseline at Contracting	Baseline at Contracting	6/1/23	4/1/24	Update on IT ABC for revised schedule changes
Project inception	Initial Estimate	9/1/21	6/30/22	Estimate from initial IT-ABC

Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs

Clear Selection



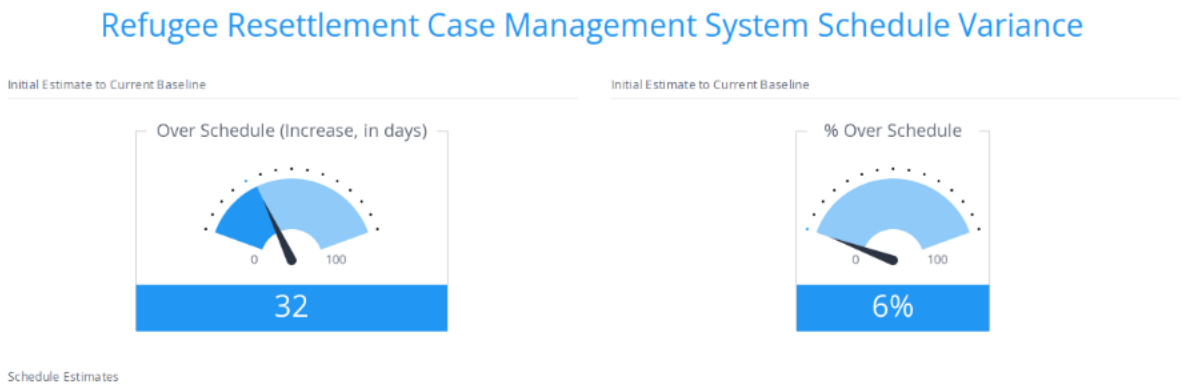
Agency of Human Services (AHS)

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS CO Refugee Resettlement Program Solution				
Agency/Department	Agency of Human Services (AHS) Central Office		Current Project Phase		Closing
Original Project Start Date	7/31/2023	Original Project Estimated End Date	9/27/2025	Number of Change Orders Approved	3
Actual Start Date	12/23/2024	Current Estimated End Date	9/27/2025		
Project	Status		Update		
Scope	ON TRACK		All contract scope has been delivered.		
Schedule	ON TRACK		This system is live. Closeout was held on October 7, 2025.		
Budget	ON TRACK		This initiative is 100% federally funded. The final cost was in line with the baselined budget.		
Overall	ON TRACK				
Scope Summary					
Procurement of an automated system that will more accurately capture information necessary to fulfill the needs of refugees in Vermont and complete federal reporting requirements.					
Schedule Summary					
Project began in August 2023 and closed on October 7 2025.					
Budget Summary					
Total Original Estimated Implementation Cost		Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget		
$277,002.60		$459,135	ON TRACK		
Total Original Estimated Operating Cost		Total Current Estimated State Operating Cost	Budget Status – Over or Under Budget		

$553,782.65	**$468,121.15**	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$830,785.25	**$927,256.15**	**ON TRACK**
Solution Lifecycle Years	**5**	

Schedule Variance and Budget to Actuals Charts

Source : Wrike Core (6128041).

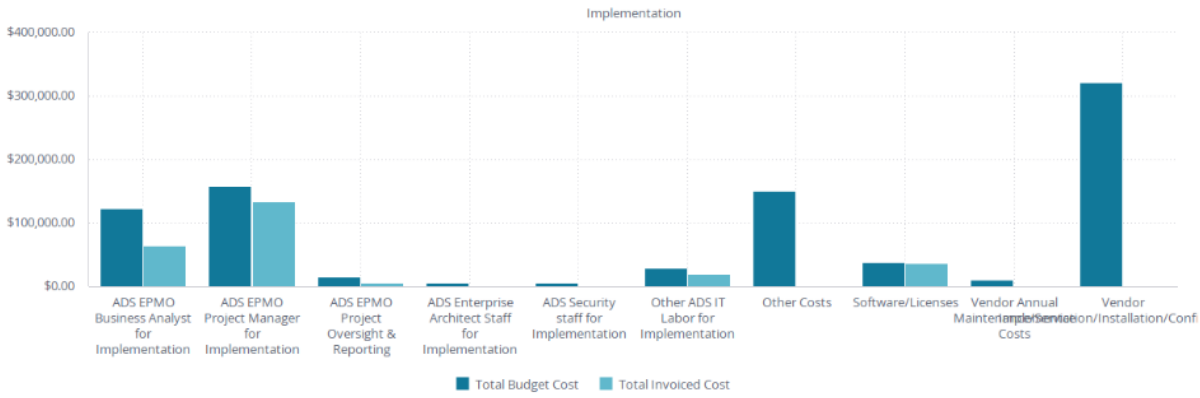


Source : Wrike Core (6128041).

Refugee Resettlement Case Management Project
Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS DAIL Adult Services Division CRMS				
Agency/Department	Agency of Human Services (AHS) Department for Aging and Independent Living		**Current Project Phase**		Execution
Original Project Start Date	3/1/2022	**Original Project Estimated End Date**	10/31/2026	**Number of Change Orders Approved**	3
Actual Start Date	8/8/2024	**Current Estimated End Date**	10/31/2026		
Project	**Status**		**Update**		
Scope	**ON TRACK**		The project scope, initially defined by user stories, is being further refined through discovery sessions with the contractor's business analyst. This scope will be documented in the relevant project documents, and an Azure DevOps project site will be utilized to manage user stories, which serve as the requirements for the scope. This platform will facilitate the review, modification, validation, and acceptance of these requirements. Adjustments to the scope are currently under review due to findings from the discovery phase, including the unavailability of anticipated data collection interfaces and the need to explore alternative data sources.		
Schedule	**MANAGEABLE RISKS**		The project is currently in the discovery phase and is under close observation. During this phase, it became evident that the program's business needs are both complex and extensive. Although related business tasks took longer than expected, they have now been completed. The implementation project schedule is being carefully monitored, and so far, no changes to the start or go-live dates are necessary. The schedule will continue to be reviewed and updated as needed as the solution implementation progresses.		
Budget	**ON TRACK**		The project budget is currently on track. Any change requests that involve cost adjustments will be reflected in the budget and, if necessary, through contract amendments. Efforts will be made to minimize changes that could impact the budget. The State Project Manager will oversee the budget using the ADS EPMO Project		

		Management Tool, which will track both contractor and state expenses. This tool will be used throughout the solution's life cycle to update and maintain records of implementation and operational costs. It will also account for any cost changes related to approved change requests for contractor implementation and management services, as well as adjustments to state solution support and software costs.
Overall	**ON TRACK**	

Scope Summary

The AHS DAIL Adult Services Division CRMS project is dedicated to enhancing the Adult Services Division through the development and implementation of a comprehensive Case Management System. The project scope has been defined by requirements (user stories) and will undergo further refinement during discovery sessions with a Contractor Business Analyst. The project aims to provide a robust and efficient system for managing cases within the Adult Services Division. As part of the project, a Legal dashboard will be provided to grant DAIL Legal Counsel access to the necessary information for authorized legal processes. This dashboard will serve as a centralized platform for accessing case-related information, supporting legal proceedings and ensuring compliance with legal requirements. Where viable the ASD CRM Solution will interface with other Department, Agency and State solutions for efficiency in business processes to best serve Vermonters.

Schedule Summary

The Project is in the discovery phase and is currently on track. The Implementation Project Schedule was reviewed and adjusted by the Adult Services Project Team and Contractor representatives, no changes to Start or Go-Live dates during this review. The Schedule will be monitored and updated as needed as the solution implementation moves forward.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
2365287.35	2365287.35	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
1404227.5	1404227.5	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
3769514.85	3769514.85	**ON TRACK**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

AHS DAIL Adult Services Division CRMS Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

706

Initial Estimate to Current Baseline

% Over Schedule

170%

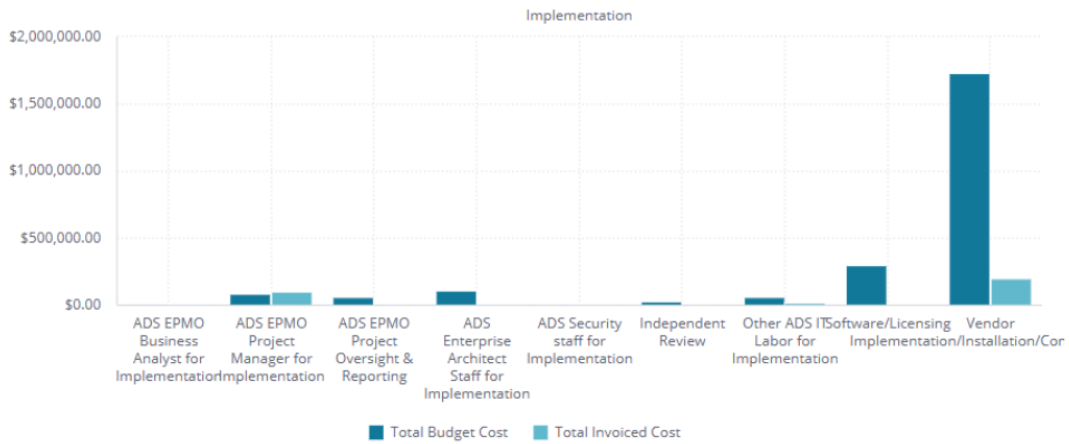
Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Baseline at Contracting	Baseline at Contracting	3/1/22	7/31/26	Based on Contract Implementation work timeline.

AHS DAIL Adult Services Division CRMS Annual Report Budget Summary

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS DAIL DDSD Client Document Management Solution				
Agency/Department	Agency of Human Services (AHS) Department for Aging and Independent Living		**Current Project Phase**		Execution
Original Project Start Date	6/17/2024	**Original Project Estimated End Date**	10/21/2025	**Number of Change Orders Approved**	7
Actual Start Date	12/23/2024	**Current Estimated End Date**	10/21/2025		

Project	Status	Update
Scope	**ON TRACK**	Scope was tightly managed to reflect a minimum viable product (MVP). Data migration was added to the project to improve the user experience. All scope was delivered.
Schedule	**MANAGEABLE RISKS**	This system is live as of August 22 2025.
Budget	**ON TRACK**	The addition of data migration cost $15,000. The multiple delays cost $133,514 in State labor. Change requests for both have been approved.
Overall	**ON TRACK**	

Scope Summary

Agency of Human Services (AHS) Department of Disabilities Aging and Independent Living (DAIL) Disability has a priority to create a module to accommodate document sharing related to the State's HCBS conflict of interest compliance initiative. This module will allow Case Management Entities, Direct Services Providers (DA/SSAs) and the State to transmit information (including check in/check out capacity). Ensuring audit trails for version control is paramount in this initiative.

Schedule Summary

Project was approved on May 28 2024 and was to be completed before March 31 2025. The project encountered multiple delays and went live on August 22 2025. Project closed on October 21 2025.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$565,036.40	$713,550.40	**ON TRACK**

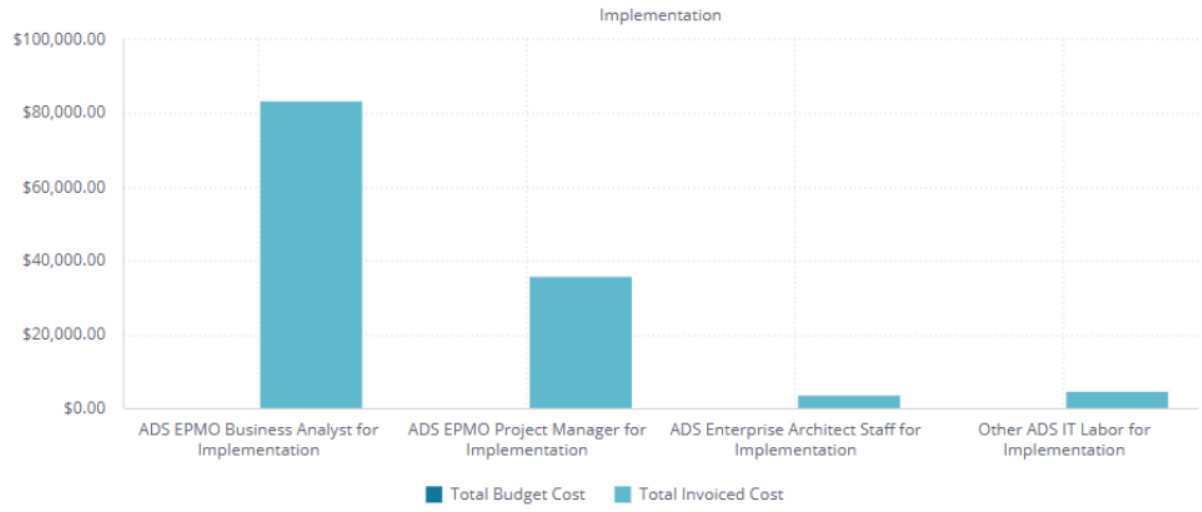
Total Original Estimated Operating Cost	Total Current Estimated State Operating Cost	Budget Status – Over or Under Budget
$101,170	$101,170	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$666,206.40	$814,720.40	ON TRACK
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

AHS DAIL Developmental Disabilities Services CRMS Annual Report Budget Summary

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS DAIL DLP Adult Protective Services Investigation System				
Agency/Department	Agency of Human Services (AHS) Department for Aging and Independent Living		**Current Project Phase**		Execution
Original Project Start Date	8/1/2019	**Original Project Estimated End Date**	10/31/2025	**Number of Change Orders Approved**	14
Actual Start Date	8/8/2024	**Current Estimated End Date**	10/31/2025		
Project	**Status**		**Update**		
Scope	**ON TRACK**		During the post-implementation phase, the project scope has remained consistent, focusing on completing post-implementation deliverables, addressing implementation bug fixes, and making implementation enhancements, all within the original project scope. Any additional work on the solution now involves enhancements, which are being implemented through change request statements of work.		
Schedule	**MANAGEABLE RISKS**		The target go-live date for the new solution was successfully achieved with its launch on June 1, 2024. Post-implementation deliverables, including addressing bug fixes and making enhancements, have been evaluated and launched on various dates, with the final launch scheduled for on or before October 31, 2025. These items will have a six-month warranty based on their respective launch dates. The solution will then transition to the operational phase, with enhancements having their own schedules and assigned warranty periods.		
Budget	**MANAGEABLE RISKS**		The project successfully remained within the adjusted implementation budget. The ongoing enhancements are separate from the initial implementation and are funded through the contingency funding outlined in Contract Amendment 1.		
Overall	**ON TRACK**				
Scope Summary					

The AHS DAIL DLP Adult Protective Services Investigation System project is dedicated to enhancing Adult Protective Services investigations through the development and implementation of a comprehensive system. The project began with the definition of initial requirements, and ongoing refinement takes place during the User Story discovery and approval processes. The project team is careful to maintain the original scope while incorporating necessary updates to meet the evolving needs of Adult Protective Services.		
Schedule Summary		
The Investigation solution was deployed to the production environment on May 30, 2024, and became live for users on June 1, 2024. Currently, post-implementation bug fixes and enhancements are being worked on and are scheduled to be deployed to production by October 31, 2025. These updates will be covered under a warranty period.		
Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$1,459,456.75	$1,284,686.75	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$1,418,850	$1,678,850	**OVER BUDGET**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$2,878,306.75	$2,963,536.75	**OVER BUDGET**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

AHS DAIL DLP Adult Protective Services Investigation System Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

420

Initial Estimate to Current Baseline

% Over Schedule

131%

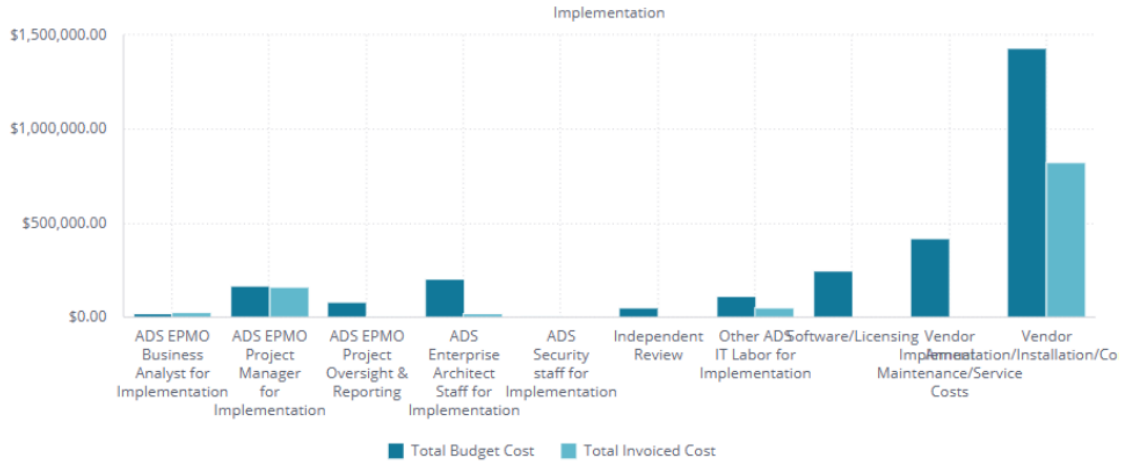
Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Baseline at Contracting	Baseline at Contracting	1/23/23	12/31/25	Based on Contract Implementation work timeline.
Initial Estimated Project Start-Finish Dates	Initial Estimate	4/9/21	6/30/22	Estimate at initial IT ABC

AHS DAIL DLP Adult Protective Services Investigation System Annual Report Budget Summary

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS DAIL Office of Public Guardian CRMS				
Agency/Department	Agency of Human Services (AHS) Department for Aging and Independent Living		**Current Project Phase**		Planning
Original Project Start Date	4/5/2023	**Original Project Estimated End Date**	7/31/2027	**Number of Change Orders Approved**	0
Actual Start Date		**Current Estimated End Date**	7/31/2027		

Project	Status	Update
Scope	**ON TRACK**	The scope remains unchanged. It has been defined by user story requirements and may be refined during the final stages of planning and procurement, with further adjustments possible during discovery sessions with the Contractor Business Analyst.
Schedule	**ON TRACK**	The project does not have a vetted implementation schedule as it is still in the planning and procurement phase. The business aims for a go-live date no later than July 2027.
Budget	**ON TRACK**	The project's cost has not been finalized yet. Currently, only an estimated cost is available, derived from a cost analysis conducted during the project's initiation phase.
Overall	**ON TRACK**	

Scope Summary

The Office of Public Guardian (OPG) project aims to improve services for Vermonters by developing and implementing a comprehensive case management system. This solution will manage program responsibilities, including referrals, requests, evaluations, diversions, assignments, case management, reporting, and the financial management of clients by fiscal guardians. The scope is outlined by user story requirements and will be further refined during discovery sessions with a Contractor Business Analyst. Where possible, the OPG CRM Solution will integrate with other departmental, agency, and state systems to enhance business process efficiency and better serve Vermonters.

Schedule Summary

The project is currently in the planning and procurement phase and is progressing as scheduled. Once a vendor is selected, an implementation schedule will be established. This schedule will be regularly monitored and updated as necessary as the implementation of the solution advances.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget

$1,597,988	$1,597,988	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$2,065,262.75	$2,065,262.75	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$3,663,250.75	$3,663,250.75	**ON TRACK**
Solution Lifecycle Years	**5**	

Schedule Variance and Budget to Actuals Charts

AHS DAIL Office of Public Guardian CRMS Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

0

Initial Estimate to Current Baseline

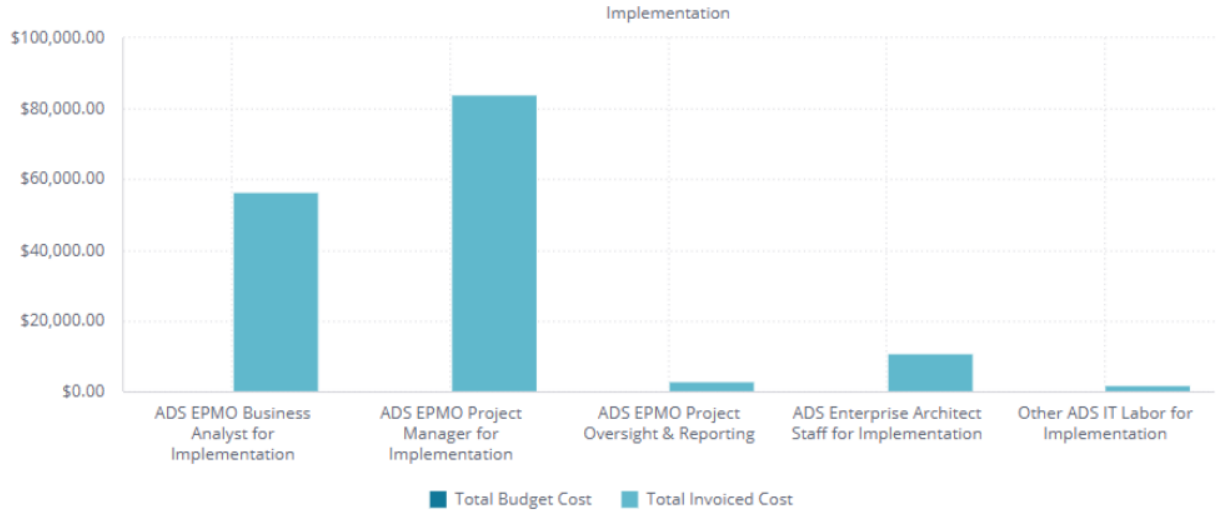
% Over Schedule

0%

AHS DAIL Office of Public Guardian CRMS Annual Report Budget Summary

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS DCF CDD Integrated Information System				
Agency/Department	Agency of Human Services (AHS) Department for Children and Families		**Current Project Phase**		Closing
Original Project Start Date	7/1/2020	**Original Project Estimated End Date**	8/31/2025	**Number of Change Orders Approved**	60
Actual Start Date	4/19/2021	**Current Estimated End Date**	8/31/2025		
Project	**Status**		**Update**		
Scope	**MANAGEABLE RISKS**		Project closed on 09/31/2025.		
Schedule	**ON TRACK**		Project closed on 9/31/2025.		
Budget	**MANAGEABLE RISKS**		Project closed on 9/31/2025		
Overall	**MANAGEABLE RISKS**				

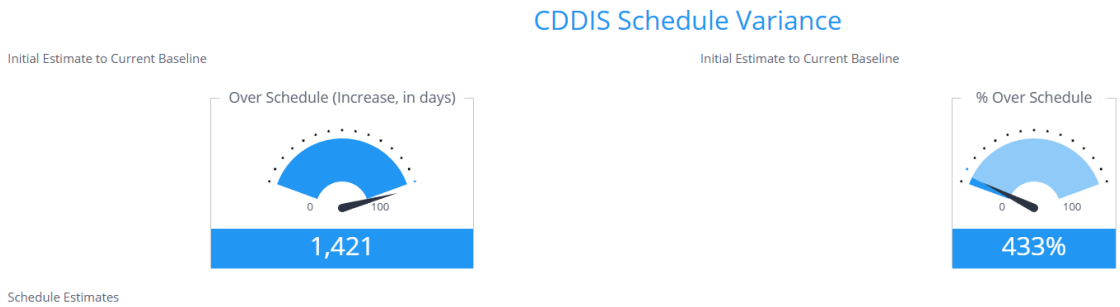
Scope Summary

The State of Vermont recognizes the need for a robust and flexible Case Management solution within its Salesforce platform. To achieve this, the state plans to build a modular system that aligns with a common Human Service Data Model and integrates seamlessly through Mulesoft. This approach will enable efficient case management, promote extensibility, and consolidate technology resources. The modular Case Management solution will be designed to accommodate the unique requirements of various human service programs. By aligning with a common Human Service Data Model, the system will ensure consistency and interoperability across different programs. This will facilitate data sharing, streamline processes, and enhance collaboration among different stakeholders. Integration through Mulesoft will enable seamless communication and data exchange between the Case Management solution and other systems. This integration will ensure that relevant data is accessible and up-to-date, enabling real-time decision-making and efficient case management. Mulesoft's capabilities will enhance the overall functionality and connectivity of the system. To ensure extensibility and consolidation of technology, the Case Management solution will leverage common service applications. These applications will include Business Rules Management, Notice Generation, and Identity Authorization Management. By utilizing these common service applications, the system will be able to adapt to changing requirements, generate notices and communications efficiently, and manage identity authorization securely. The modular design of the Case Management solution will allow for flexibility and scalability. New modules can be added or modified as needed, ensuring that the system can adapt to evolving program requirements and accommodate future enhancements. This approach promotes long-term sustainability and reduces the need for extensive system overhauls. In conclusion, the development of a modular Case Management solution within the State's Salesforce platform represents a significant step forward in streamlining human service programs. By aligning with a common Human Service Data Model,

integrating through Mulesoft, and leveraging common service applications, the state aims to enhance case management processes, improve data sharing, and ensure efficient collaboration among stakeholders. This project's successful implementation will enable the State of Vermont to effectively manage cases and provide quality services to its constituents.
Schedule Summary
The implementation of the project, initially slated for an 8-month timeframe to achieve a Minimum Viable Product (MVP), commenced with the contract engagement with Brite Systems in Spring of 2021. Ongoing complexities inherent in the solution's intricacies and the necessity to align with Legislative changes have led to an extension beyond the originally estimated timeline. Since its initiation in July 2020, modifications in staffing, scope adjustments, and technology upgrades have notably influenced the project's schedule. As of present, the anticipated completion date for the project stands at April 2025. The Schedule will be updated as we need to add more sprints based on the backlog prioritization.

Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$2,245,477	$5,459,294.82	**OVER BUDGET**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$4,281,975	$4,156,975	**UNDER BUDGET**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$6,527,452	$9,616,269.82	**OVER BUDGET**
Solution Lifecycle Years	5	

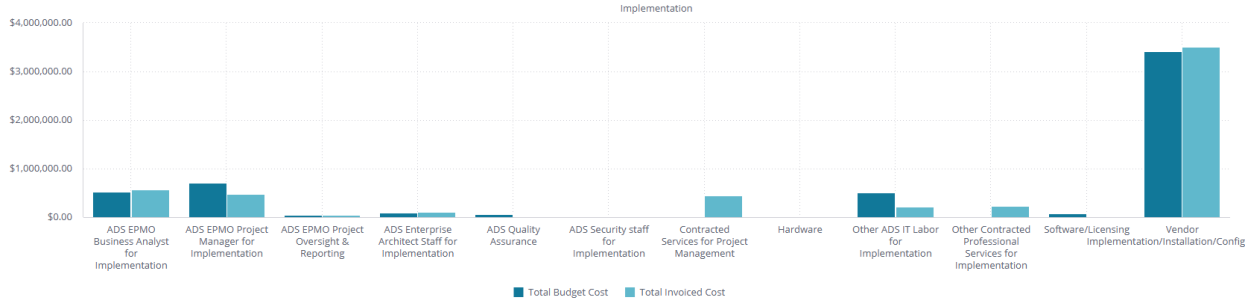
Schedule Variance and Budget to Actuals Charts



CDDIS Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS DCF CDD IS Phase 2				
Agency/Department	Agency of Human Services (AHS) Department for Children and Families		**Current Project Phase**		Initiation
Original Project Start Date	9/26/2023	**Original Project Estimated End Date**	4/1/2027	**Number of Change Orders Approved**	0
Actual Start Date		**Current Estimated End Date**	4/1/2027		

Project	Status	Update
Scope	**ON TRACK**	It has been agreed that feature parity with the Bright Futures Information System is the top priority in scope. The team has successfully validated and approved 545 user stories, which collectively define the full scope of this project.
Schedule	**ON TRACK**	The project is currently in the bid evaluation phase, where the team is actively scoring submissions to identify finalists. Once the finalists are selected, the next steps will involve scheduling demonstrations to assess their capabilities in detail. Following these demonstrations, final selections will be made. With these ongoing activities, the estimated contract execution date is April 1, 2026.
Budget	**ON TRACK**	At this stage, the project remains within budget, with expenditures limited to invoices from internal team members, as the vendor selection process is still underway. Currently, bids are being evaluated, and it has been observed that most exceed the initial cost estimates. Consequently, additional funding will be necessary to support the successful completion of this project.
Overall	**ON TRACK**	

Scope Summary

The State of Vermont recognizes the need to modernize the Bright Futures Information System (BFIS) to overcome the limitations of the current outdated platform. The existing BFIS application has proven to be inadequate, prone to errors, and lacks the capability to accommodate new functionality. To address these challenges and improve the security posture of the
AHS DCF, a project has been initiated to replace BFIS with a more robust and modern solution.

The primary objective of this project is to enable both the Child Development Division (CDD) and the Agency of Digital Services (ADS) Maintenance & Operations (M&O) teams to focus on maintaining a single solution. By replacing BFIS, the project aims to streamline operations and reduce the burden of maintaining multiple systems. This consolidation will enhance efficiency and allow for better allocation of resources. Furthermore, the replacement of BFIS will significantly improve the security posture of AHS DCF. The outdated platform of BFIS poses security risks, and the new solution will address these vulnerabilities. By implementing a modern and secure system, the project will enhance data protection and ensure compliance with industry standards and regulations. The scope of phase 2 of this project involves building upon the Phase 1 Salesforce application in Org 2. This Salesforce application aligns with a common Human Service Data Model, providing a standardized framework for data management.
The integration of the Salesforce application through Mulesoft enables seamless data exchange and interoperability with other systems, enhancing overall data management and accessibility.
In conclusion, the modernization of the Bright Futures Information System represents a significant step forward in improving functionality and security for the AHS DCF. By replacing the outdated BFIS with a more robust and modern solution, the project aims to streamline operations, enhance data security, and improve the overall efficiency of the agency. The
completion of phase 2 will build upon the Salesforce application and align it with a common Human Service Data Model, ensuring standardized data management and integration capabilities.

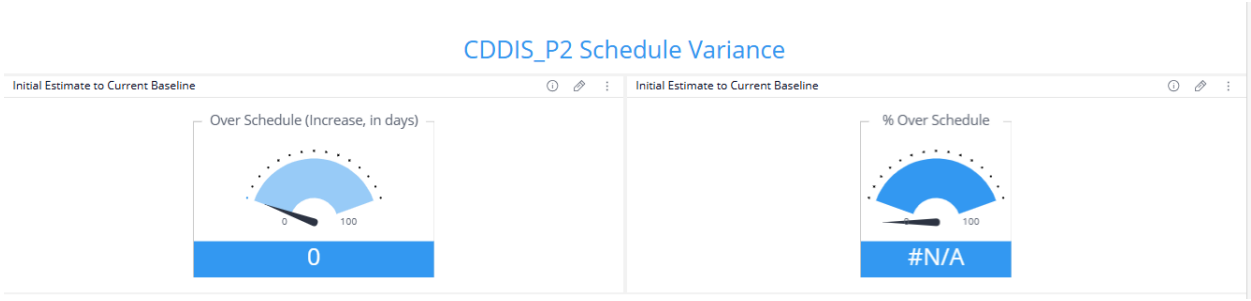
Schedule Summary

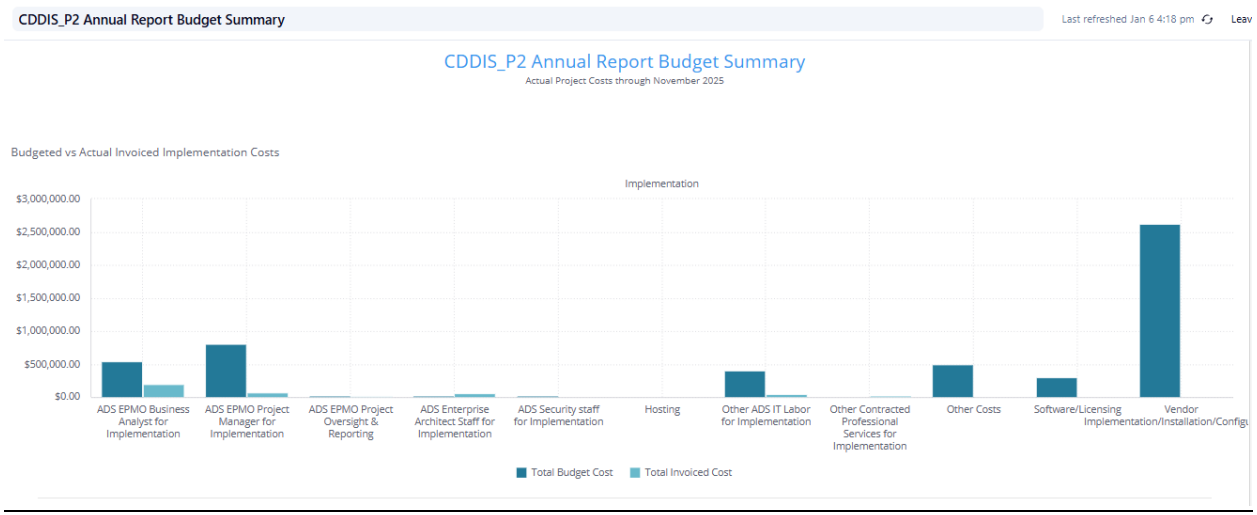
The project commenced on September 26, 2023, with an estimated contract execution date of April 1, 2026. As the team progresses towards contract execution, the implementation timeline will be defined, with an anticipated duration of 12 to 18 months.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$5,243,472.03	$5,243,472.03	ON TRACK
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$3,324,825	$3,324,825	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$8,568,297.03	$8,568,297.03	ON TRACK
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts





IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS DCF CCWIS				
Agency/Department	Agency of Human Services (AHS) Department for Children and Families		**Current Project Phase**		Planning
Original Project Start Date	1/2/2023	**Original Project Estimated End Date**	3/31/2028	**Number of Change Orders Approved**	0
Actual Start Date	1/2/2023	**Current Estimated End Date**	3/31/2028		

Project	Status	Update
Scope	**ON TRACK**	Our project scope remains on track, aligning with the defined objectives and requirements.
Schedule	**MANAGEABLE RISKS**	Our project schedule has extended to allow for a more thorough proposal review for implementation vendor selection.
Budget	**MANAGEABLE RISKS**	Most implementation vendor costs exceed the current approved budget.
Overall	**MANAGEABLE RISKS**	The project team is managing schedule and budget risks as the final implementation vendor is selected with their leadership.

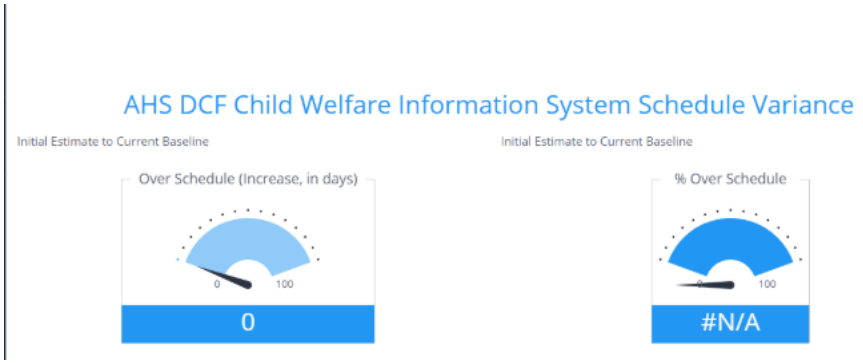
Scope Summary

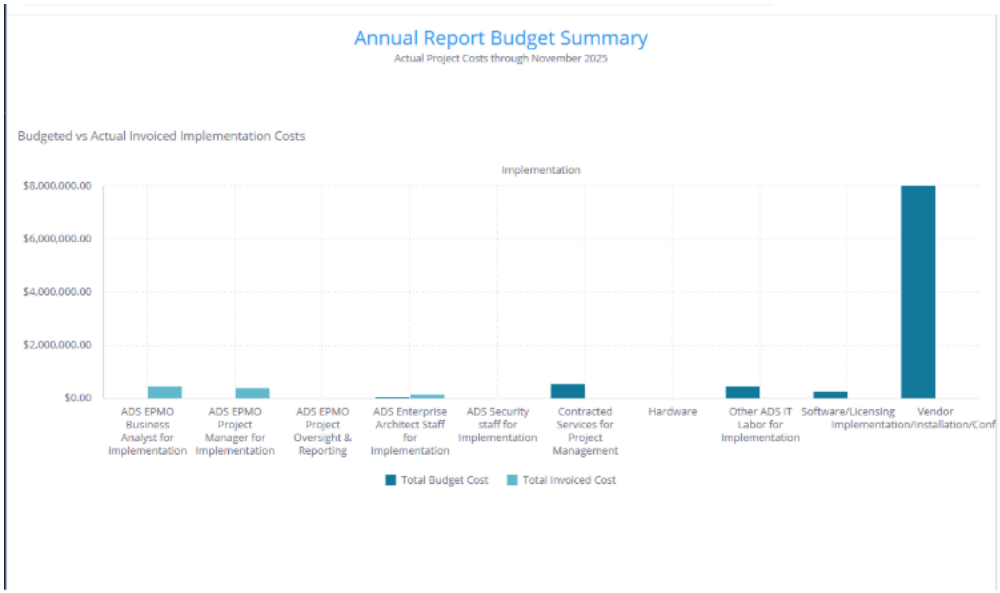
The State of Vermont is committed to enhancing child welfare services through the implementation of the CCWIS Solution Project. This project aims to develop and implement a comprehensive child welfare information system that will improve data management and decision-making processes. The CCWIS Solution Project encompasses various stages, including design, development, and integration of the CCWIS. The system will be designed to meet the specific needs and requirements of child welfare services in Vermont. It will enable efficient data collection, storage, and analysis, providing a comprehensive view of child welfare cases. Data migration is a critical component of the project, ensuring a seamless transition from the existing system to the new CCWIS. The migration process will involve transferring data from the old system to the new system, ensuring data integrity and accuracy. Staff training will also be provided to ensure that users are proficient in utilizing the new system effectively. The key objectives of the CCWIS Solution Project are to ensure compliance with federal guidelines, enhance data sharing, and increase efficiency in case management. The system will be designed to meet federal requirements and guidelines, ensuring that child welfare services in Vermont are in alignment with national standards. The CCWIS will also facilitate improved data sharing among relevant stakeholders, enabling better collaboration and coordination in child welfare cases. Additionally, the system will enhance efficiency in case management, streamlining processes and reducing administrative burdens. It is important to note that the project scope is focused solely on the development and implementation of the CCWIS. Unrelated IT developments and hardware overhauls are excluded from the scope to maintain project focus and efficiency. The deliverables of the project include a fully functional CCWIS, comprehensive documentation, and a support plan. The system will be thoroughly tested and validated to ensure its functionality and reliability. Documentation will provide guidance on system usage, maintenance, and troubleshooting. A support plan will be established to address

any issues or concerns that may arise during system operation. The CCWIS Solution Project is subject to budget limitations and strict adherence to data privacy laws. The project will be managed within the allocated budget, ensuring efficient resource utilization. Data privacy laws and regulations will be strictly followed to protect sensitive information and maintain confidentiality.
Schedule Summary
This CCWIS Solution Project is currently in exploration phase, actively reviewing bids from potential vendors. An implementation vendor will be selected eary 2026.

Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$8,568,297.03	$8,568,297.03	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$2,643,120	$2,643,120	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$12,139,828	$12,139,828	**ON TRACK**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts




Annual Report Budget Summary
Actual Project Costs through November 2025
Budgeted vs Actual Invoiced Implementation Costs
Implementation
$8,000,000.00
$6,000,000.00
$4,000,000.00
$2,000,000.00
$0.00
ADS EPMO Business Analyst for Implementation
ADS EPMO Project Manager for Implementation
ADS EPMO Project Oversight & Reporting
ADS Enterprise Architect Staff for Implementation
ADS Security staff for Implementation
Contracted Services for Project Management
Hardware
Other ADS IT Labor for Implementation
Software/Licensing
Vendor Implementation/Installation/Conf
Total Budget Cost
Total Invoiced Cost

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS DMH CANS/ANSA				
Agency/Department	Agency of Human Services (AHS) Department of Mental Health		**Current Project Phase**		Execution
Original Project Start Date	9/3/2024	**Original Project Estimated End Date**	7/31/2025	**Number of Change Orders Approved**	1
Actual Start Date	9/20/2024	**Current Estimated End Date**	3/31/2026		
Project	**Status**		**Update**		
Scope	**MANAGEABLE RISKS**		The scope is defined as part of the Request for Proposal (RFP) and executed contract.		
Schedule	**MANAGEABLE RISKS**		The project is scheduled to complete in March of 2026		
Budget	**ON TRACK**		Spending continues to be within project expected budget.		
Overall	**MANAGEABLE RISKS**		Overall manageable risk as project is still set to complete with March of 2026		

Scope Summary

The main objectives of the project are to deliver Transformational Collaborative Outcomes Management (TCOM) Implementation technical assistance and consultation, a Dashboard, and a Decision Support Model (DSM) for certain populations.

Schedule Summary

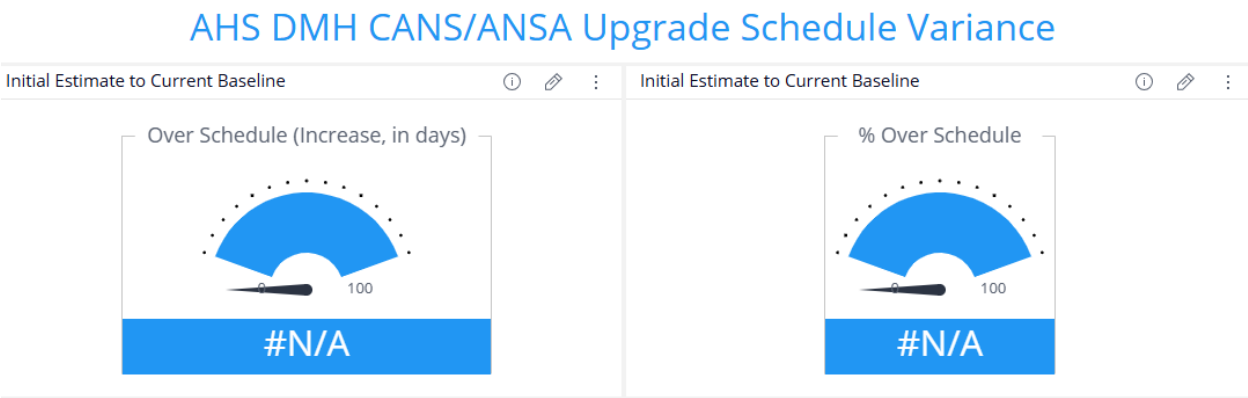
Implementation started in September 2024 and is expected to complete March 2026. However, there have been some delays therein on when we expected deliverables from implementation vendor and adjustments to the details of the schedule.

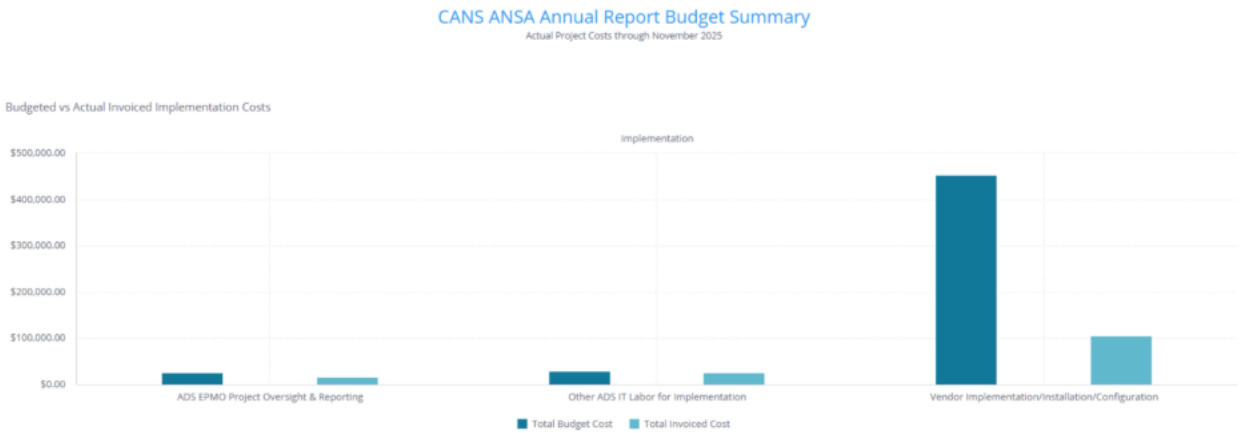
Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$507,695	$507,695	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$15,000	$15,000	**ON TRACK**

Total Original Estimated IT Activity Cost	Total Current Estimated State IT Activity Cost	Budget Status – Over or Under Budget
$522,695	$522,695	**ON TRACK**
Solution Lifecycle Years	**5**	

Schedule Variance and Budget to Actuals Charts





IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS DVHA MMIS Special Investigations Unit (SIU) Case Management System (CMS)				
Agency/Department	Agency of Human Services (AHS) Department of Vermont Health Access		**Current Project Phase**		Initiation
Original Project Start Date	6/21/2023	**Original Project Estimated End Date**	11/28/2025	**Number of Change Orders Approved**	0
Actual Start Date	6/3/2025	**Current Estimated End Date**	1/28/2028		

Project	Status	Update
Scope	**ON TRACK**	-Replace current Microsoft Access Databases by implementing a new case management system for the Special Investigations Unit (SIU) and Coordination of Benefits (COB) -Successful decommissioning of the Surveillance and Utilization Review Subsystem (SURS) and Provider Suspension Microsoft Access Databases, the Third-Party Liability (TPL) System and the shared drive files are migrated to the new solution, and the new system meets security -The proposed application/solution must have capabilities that would aide Special Investigations Unit (SIU) and Coordination of Benefits (COB) in creating reporting metrics that would allow DHVA to measure compliance with CFR and VSA.
Schedule	**ON TRACK**	The project is currently in the planning phase, with teams concentrating on finalizing the IT ABC Analysis form and the RFP, which is expected to be completed by October 31, 2025. The plan is to submit these documents to CMS for approval in November 2025, prior to soliciting bids from vendors.
Budget	**ON TRACK**	Total estimated budget for implementation is $904,240.00. Since the project awaits IT ABC finalization and approval, actuals as of date has not been recorded.
Overall	**ON TRACK**	

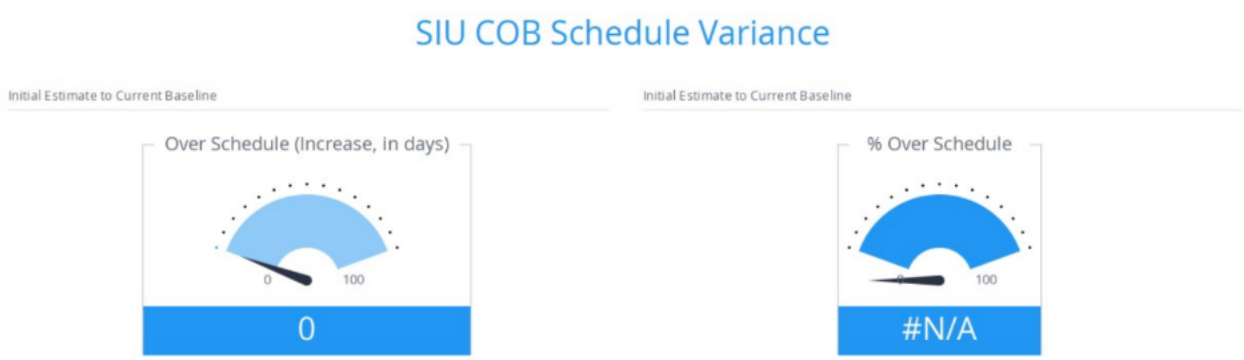
Scope Summary

DVHA seeks to procure a new case management system for the Special Investigations Unit (SIU) and Coordination of Benefits (COB) units to replace their current Microsoft Access systems. These current systems utilize technology that is no longer supported, unstable, unreliable and undersized. The new case management system will support file storage, auditability, accuracy and can update and manipulate data therefore minimizing the risks

of losing data. Both Units experience similar problems with their current systems, requiring growth, the need to secure appropriate case workflows & the necessary file permissions which today are open for any staff to modify. For TPL, the COB team needs accurate account records, ability to share information, awareness of staff updates & audit capabilities, all of which are missing today.
Schedule Summary
The project is currently pending approval for the IT ABC and the finalization of the RFP, which is anticipated to be submitted to CMS by October 31, 2026. The projected Go Live and completion date is being targeted for September 2026.

Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$987,069.80	$987,069.80	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
	0	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
	$987,069.80	**ON TRACK**
Solution Lifecycle Years	5	

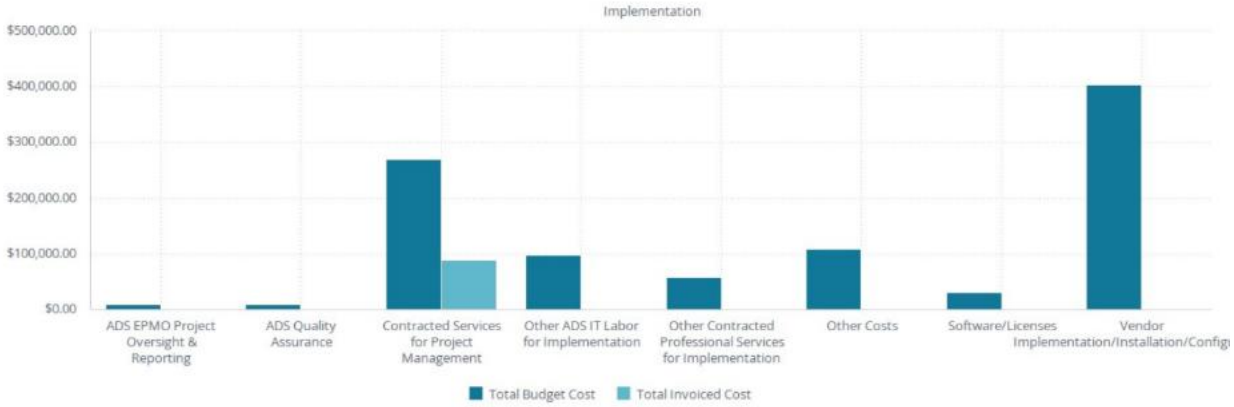
Schedule Variance and Budget to Actuals Charts



SIU COB Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



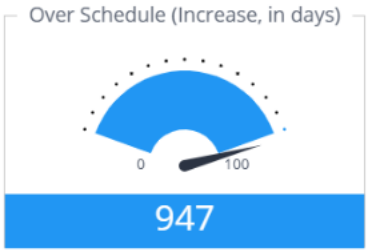
IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS DVHA Integrated Eligibility and Enrollment System (VT-IES)				
Agency/Department	Agency of Human Services (AHS) Department for Vermont Health Access		**Current Project Phase**		Planning
Original Project Start Date	7/20/2023	**Original Project Estimated End Date**	6/30/2028	**Number of Change Orders Approved**	0
Actual Start Date	7/20/2023	**Current Estimated End Date**	6/30/2028		
Project	**Status**		**Update**		
Scope	**ON TRACK**		The Vermont Integrated Eligibility and Enrollment (VT-IES) Project aims to modernize the state's eligibility system through a phased, modular approach, enhancing user experience for both residents and staff. This new system will introduce a Customer Portal, Case Management, and Rules Engine to streamline access, improve accuracy, and ensure efficient eligibility determinations. By replacing outdated systems, the project seeks to provide a customer-centered, reliable, and efficient service platform for Vermonters.		
Schedule	**NEEDS LEADERSHIP INTERVENTION**		The project is in the Planning phase and is actively engaged in procurement. Actual dates for future milestones are dependent upon the outcome of the procurement and the final, executed contract with the selected vendor. At this time, the Planning phase is anticipated to be completed by Q2 2026. The project Execution phase is anticipated from Q3 2026 to Q3 2029, with a phased implementation over an estimated three years for the chosen solution. The project Closing phase is anticipated in Q4 2029.		
Budget	**ON TRACK**		The approved budget for implementation is $112,099,813.80. As of October 2025, the implementation spend captured by EPMO invoice tracking is $3,392,224.49, representing approximately 3.03% of the total budget.		
Overall	**ON TRACK**				
Scope Summary					

The Vermont Integrated Eligibility System (VT-IES) Project is a crucial part of the state's effort to modernize its IE&E system. The current system faces operational and technical challenges impacting Vermonters and state staff. The VT-IES Project aims to address these issues by implementing a customer-focused IES through a phased, modular procurement strategy. The new IES will consist of a Customer Portal, Case Management, and Rules Engine modules, replacing legacy enrollment systems and optimizing eligibility, enrollment, and customer management functionality. The new IES will provide Vermonters with a centralized, simplified, and user-friendly experience for applying and managing benefits. It will ensure secure enrollment, personalized access, streamlined applications, and comprehensive customer service. State staff will benefit from reduced manual work, improved data integrity, and automated processes.		
Schedule Summary		
The VT-IES project continues to move ahead with the procurement effort for a modern IE&E solution. Beginning in Q1 2025 and continuing throughout this year, the State is evaluating proposals received from the solution vendor community. Looking ahead, the project anticipates execution of a contract with the selected vendor by the end of Q2 2026. The project Execution phase is anticipated from Q3 2026 to Q3 2029, with a phased implementation approach for the chosen solution. The project Closing phase is anticipated in Q4 2029.		
Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$112,099,813.80	$112,099,813.80	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$119,592,991	$119,592,991	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$231,692,804.80	$231,692,804.80	**ON TRACK**
Solution Lifecycle Years	5	

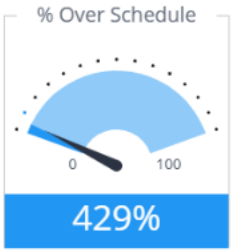
Schedule Variance and Budget to Actuals Charts

IEENTC Schedule Variance

Initial Estimate to Current Baseline



Initial Estimate to Current Baseline



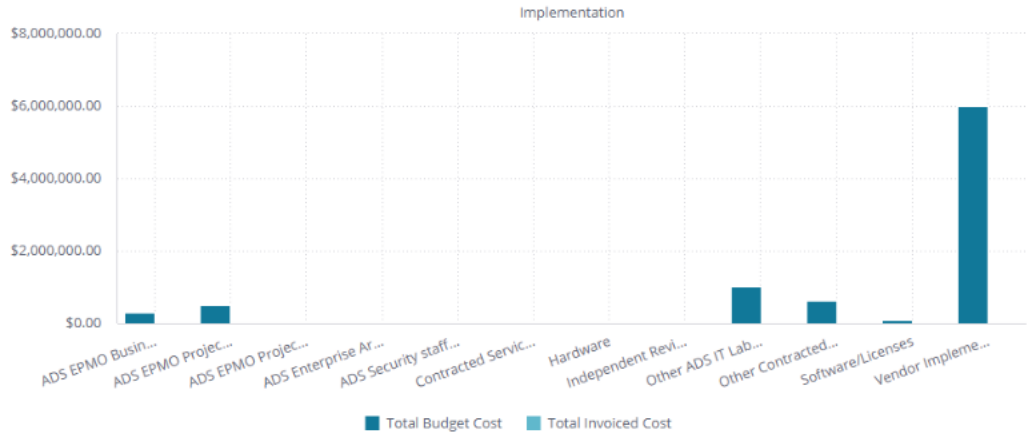
Schedule Estimates

Estimate Name	Estimate Stage	Change Date	Project Start Date	Project End Date	Change Narrative
Baseline at Contracting Start-Finish Dates	Baseline at Contracting	11/24/25	5/27/22	1/1/27	Baseline scheduled develo

IEENTC Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



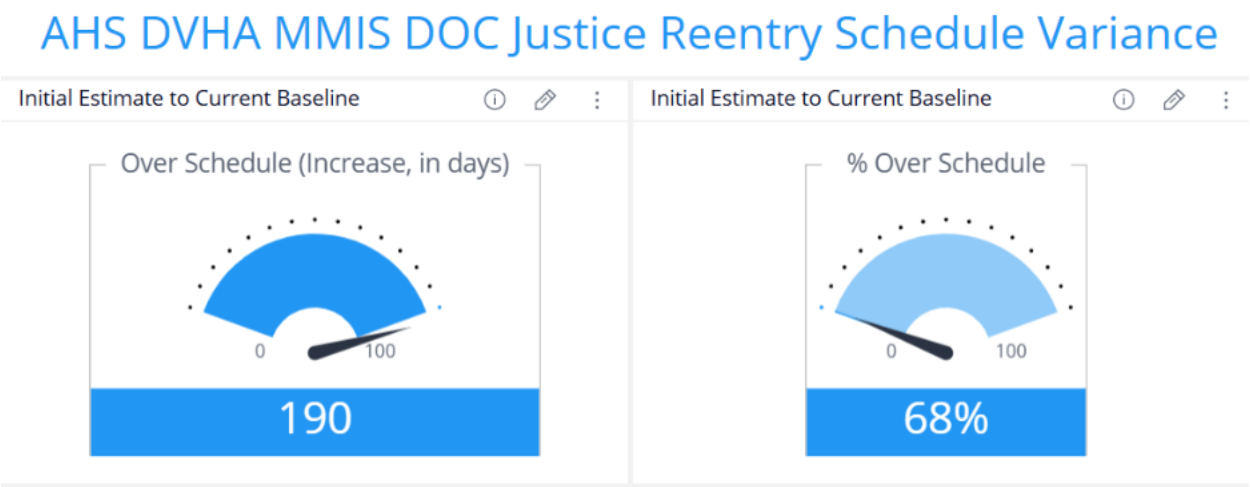
IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS DVHA MMIS DOC Justice Reentry				
Agency/Department	Agency of Human Services (AHS) Department for Vermont Health Access		**Current Project Phase**		Planning
Original Project Start Date	11/18/2024	**Original Project Estimated End Date**	1/1/2026	**Number of Change Orders Approved**	0
Actual Start Date		**Current Estimated End Date**	1/1/2026		

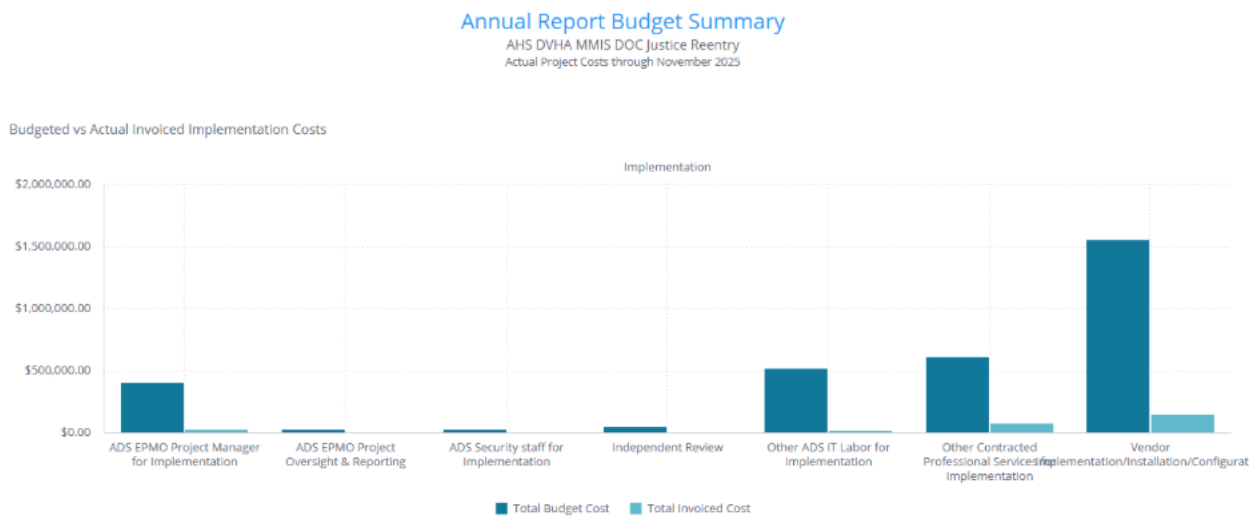
Project	Status	Update
Scope	**ON TRACK**	Despite adjustments to the implementation timeline and approach, the scope of the project remains fully aligned with the original project charter, ensuring that all planned objectives and outcomes continue to guide the work.
Schedule	**MANAGEABLE RISKS**	Over the past year, the original plan to complete full implementation of all project functionality by the end of calendar year 2025 was reassessed. The complexity of coordinating across four systems and five vendors, combined with limited resource availability due to competing AHS-wide priorities, led to delays in development progress. In response, the implementation approach was adjusted to break the work into focused workstreams, allowing for clearer prioritization and more agile decision-making. This revised structure has helped reestablish momentum and improve coordination among stakeholders. The current targets are: Ability to suspend by 12/31/2025. Ability to process bills, claims, and payments by June 2026. Enhancements reducing manual processing and data sharing by December 2026.
Budget	**MANAGEABLE RISKS**	Total project implementation budget is $1,569,349. At the start of Q4 of 2025, 6.5% has been spent totaling $101,582.
Overall	**ON TRACK**	

Scope Summary

This project aims to improve Medicaid coordination for justice-involved individuals by integrating and sharing critical data between the Department of Corrections (DOC), Vermont Health Connect (VHC), ACCESS, the Medicaid Management Information System (MMIS), and the Pharmacy Benefits Manager (PBM). It includes enhancements to the DOC's Electronic Health Record (EHR) system to capture key demographic and custody information, automated processes for suspending and restoring Medicaid benefits based on incarceration status, and coverage of a pre-release service package starting 90 days before release. The initiative also establishes member notifications at critical points and provides training for DOC and Wellpath staff to support the effective use of new systems and procedures, ultimately promoting continuity of care and successful reentry into the community.		
Schedule Summary		
To meet federal oversight requirements, the State must implement the ability to suspend Medicaid coverage for individuals entering incarceration no later than December 31, 2025. In alignment with federal commitments, functionality to support Medicaid claims processing, billing, and payments must be in place by June 2026. Following the successful implementation and stabilization of these core components, additional system enhancements will be pursued to further reduce manual processing and improve data sharing across five integrated platforms. These subsequent improvements will be prioritized and completed as soon as operationally practical.		
Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$1,569,349	$1,569,349	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
	0	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
	$1,569,349	**ON TRACK**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts





IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS DVHA MMIS Interoperability Enhancements Phase II				
Agency/Department	Agency of Human Services (AHS) Department for Vermont Health Access		**Current Project Phase**		Initiation
Project Sponsor					
Original Project Start Date	9/10/2024	**Original Project Estimated End Date**	3/31/2027	**Number of Change Orders Approved**	0
Actual Start Date		**Current Estimated End Date**	3/31/2027		
Project	**Status**		**Update**		
Scope	**ON TRACK**		Configuration of the Gainwell solutions to meet the CMS-0057-Final ruling addressing Improving Prior Authorization Processes for the 14 Medicaid Prior Authorization business units. Development of interim error reporting process to address the Analytics Data Warehouse reported errors. Complete data sharing across business units and service providers/receivers. Development of external facing APIs to satisfy CMS requirements due 1/1/2027.Perform an analysis of options for patient/member consent workflows that complies with CMS-0057-Final for informed design of either in scope solution or a change request, specifically for Payer to Payer API and Provider Access API workstreams.		
Schedule	**NEEDS LEADERSHIP INTERVENTION**		The project began on February 2, 2025, with the following anticipated completion dates: the Improved Prior Authorization set for a January 2026 Go Live, and the API implementation is scheduled for a January 2027 Go Live. This timeline aims to complete all implementation and project activities, meeting all federal certification requirements. However, components associated with Improved Prior Authorization functionality, originally planned for the January 2026 Go Live have been delayed to March 2026 due to development setbacks from the vendor, Gainwell. This delay will also affect the Provider Onboarding and SOV user training sessions, now expected to be completed by mid-April 2026. We are actively working to prevent any further		

		delays in component readiness. Meanwhile, efforts related to the January 2027 API delivery will begin in January 2026 to ensure the solution is delivered on time and fully operational by the planned Go Live date in January 2027.
Budget	**ON TRACK**	Total estimated budget for implementation is $3,957,578.06. Current implementations spend is $147.2K representing approx. 4% of the total budget.
Overall	**MANAGEABLE RISKS**	

Scope Summary

The business objective of this initiative is to support timely patient care for Vermonters by:
• Reducing administrative burden for provider organizations via online tools for submitting prior authorization requests, and for receiving and viewing notices online including Prior Authorization Notices of Decision and medical necessity determination.
• Providing new capabilities for providers to search for and view existing Prior Authorizations for patients, including supporting online submission of additional Prior Authorization information and resubmission of requests. • Streamlining operational processes for state clinical review and data entry of Prior Authorization requests, reducing administrative burden on state staff.
• Increasing real-time management visibility for Prior Authorization responsiveness and other key metrics, to ensure determinations occur in compliance with federal and state regulations.
• Supporting electronic system-to-system submission of Prior Authorization requests and responses, to provide further automation options for Prior Authorization processing for provider organizations and as one step towards Vermont State's compliance with CMS-0057-Final Rule for Interoperability and Prior Authorization.

Schedule Summary

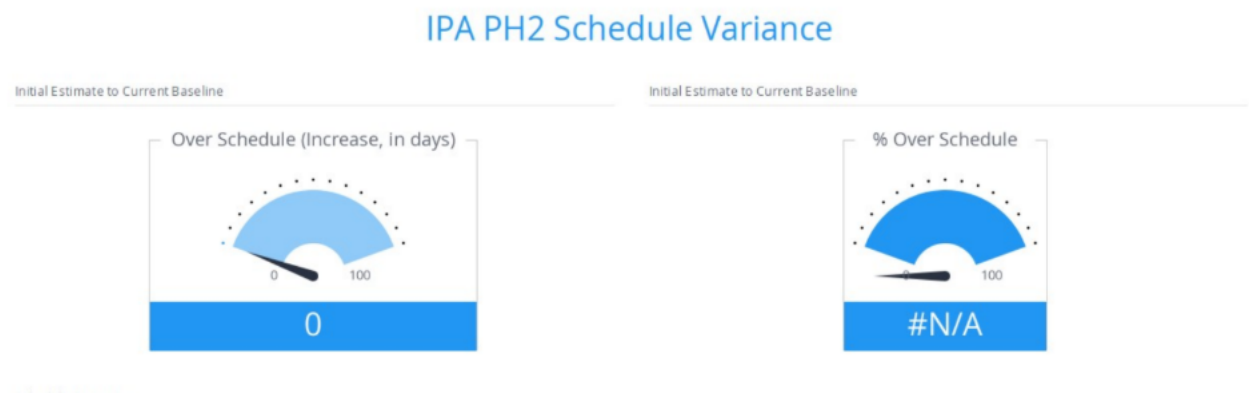
For the Prior Authorization Enhancement components, the Product Design, Development, and Implementation (DDI) phase is planned from July 2025 to February 2026. Provider Onboarding and SOV User Training will be conducted from February 2026 to April 2026. The project will transition to Maintenance and Operations (M&O) between mid-March and April 2026, with the submission of CMS 0057 Final Rule prior authorization reporting metrics by March 2026. The API Design, Development, and Implementation phase is scheduled from January 2026 through December 2026, with the final project closeout anticipated by January 2027

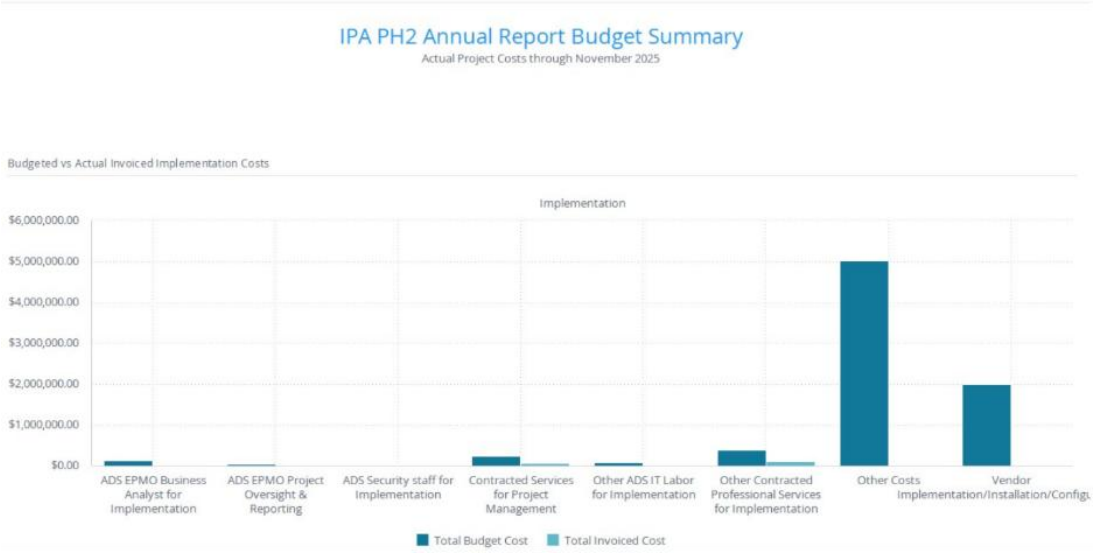
Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$3,957,578.06	$3,957,578.06	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
	0	**ON TRACK**

Total Original Estimated IT Activity Cost	Total Current Estimated State IT Activity Cost	Budget Status – Over or Under Budget
	$3,957,578.06	ON TRACK
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts





IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS DVHA MMIS Medicaid Data Warehouse & Analytic Solution (MDWAS)				
Agency/Department	Agency of Human Services (AHS) Departemnt for Vermont Health Acces		**Current Project Phase**		Execution
Original Project Start Date	1/10/2022	**Original Project Estimated End Date**	12/23/2029	**Number of Change Orders Approved**	7
Actual Start Date	8/7/2023	**Current Estimated End Date**	12/23/2025		
Project	**Status**		**Update**		
Scope	**ON TRACK**		The Medicaid Data Warehouse and Analytics Solution (MDWAS) project remains on track and aligned with its goal of improving Vermont's ability to integrate and analyze Medicaid data. Over the past year, the team has continued to enhance the Medicaid Data Lake (MDL), deployed initial phases of the Analytics Data Warehouse (ADW) and Data Analytics and Reporting (DAR) solutions, and continued onboarding users into the new environment. The project is currently engaged in a large-scale testing effort to ensure all newly developed analytics are user-friendly, accurate, and fully meet stakeholder needs. The team remains focused on delivering all baseline functionality by the end of the year while strengthening data integration, accessibility, and security.		
Schedule	**ON TRACK**		The MDWAS project began on January 10, 2022, with an implementation completion date of July 31, 2026. This will mark the close of all implementation and project activities and fulfillment of all federal certification requirements. Maintenance and Operations (M&O) are already underway for components that have gone live, ensuring continuity and support while additional functionality continues to be deployed. The core solution that meets all foundational project requirements remains on track for delivery by the end of 2025 through a series of ongoing deployments that balance flexibility and responsiveness with disciplined milestone management. The solution will continue to evolve beyond December 2025 with new analytics and reporting		

		capabilities, and the project includes baseline scope and funds to sustain and expand these capabilities through December 2029.
Budget	**MANAGEABLE RISKS**	Total estimated budget for implementation is $66,250,973.94. Current implementation spend is $20,171,613.71 representing 30.45% of the total budget. The project is currently operating in alignment with the expected burn rate.
Overall	**ON TRACK**	

Scope Summary

The AHS DVHA MMIS Medicaid Data Warehouse and Analytic Solution (MDWAS) will modernize how Vermont manages and uses Medicaid data. It will establish a secure, centralized platform for storing and analyzing claims, payments, and clinical information, making data easier to access, more accurate, and more actionable. MDWAS empowers stakeholders with user-friendly tools to analyze data and drive informed decisions while strengthening privacy protections and regulatory compliance. By integrating clinical and administrative data, the project delivers a comprehensive view of Medicaid services to improve care coordination and outcomes. Ultimately, MDWAS will transform how Vermont uses Medicaid data to enhance efficiency, transparency, and service quality for residents.

Schedule Summary

Project Design, Development, and Implementation (DDI) runs from August 2023 through December 2025. The Medicaid Data Lake (MDL) went live in October 2024, establishing the foundation for comprehensive, high-quality data sourcing. The Analytics Data Warehouse (ADW) delivered its first major release in July 2025, providing the data needed to meet most federal, state, and internal reporting requirements, with a second release in December 2025 focused on interoperability and integration of clinical and claims data. The Data Analytics and Reporting (DAR) solution completed its July and September 2025 releases, establishing foundational reporting and ad hoc analytics, with incremental releases expanding reporting to include additional federal, state, general, and advanced analytics capabilities. The project transitions to maintenance and operations (M&O) in January 2026, with CMS Certification targeted for July 2026 and final closeout by December 2029.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$63,513,862.01	$63,513,862.01	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$49,627,254	$49,627,254	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$113,141,116.01	$113,141,116.01	**ON TRACK**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

AHS MMIS MDWAS Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)
878

Initial Estimate to Current Baseline

% Over Schedule
75%

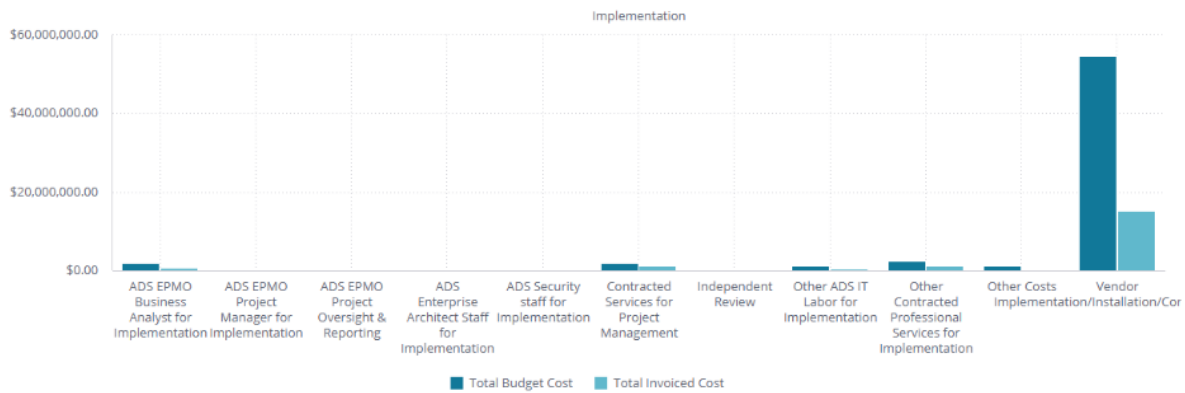
Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Baseline 2 Estimated Project Start-Finish Dates	Baseline 2	1/10/22	12/24/29	Because of the funding model for this project, the project Implementation duration was extended out to the end of the full contract with the solution provider. Implementation of the three main components of the solution will be effectively completed on January 6, 2026, followed by a six-month transition period to maintenance and operations during certification.
Baseline 1 Estimated Project Start-Finish Dates	Baseline at Contracting	1/10/22	7/20/26	Implementation schedule defined in contract at execution.
Initial Estimated Project Start-Finish Dates	Initial Estimate	1/10/22	6/12/25	Initial estimate at IT ABC Version 1

AHS DVHA MMIS MDWAS Budget Summary

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS IEE Noticing Solution				
Agency/Department	Agency of Human Services (AHS)		**Current Project Phase**		Execution
Original Project Start Date	1/27/2022	**Original Project Estimated End Date**	6/1/2026	**Number of Change Orders Approved**	4
Actual Start Date	7/20/2023	**Current Estimated End Date**	6/1/2026		
Project	**Status**		**Update**		
Scope	**MANAGEABLE RISKS**		The project scope remains clearly defined and stable. The Project Charter was updated in September 2026 to reflect revised financial tables and an updated Design, Development, and Implementation (DDI) milestones.		
Schedule	**ON TRACK**		The project remains on track and continues to achieve key milestones. The Customer Communication Management System (CCMS) contract was executed on October 1, 2025, with the contractor kickoff scheduled for November 3, 2025. In parallel, Workstream 2—focused on migrating notices to a centralized repository—has successfully completed User Acceptance Testing, with Go-Live anticipated in October 2026.		
Budget	**ON TRACK**		The project's financials remain within the approved budget parameters. The "At Contracting" ITABC was approved on September 2, 2025, establishing an implementation budget of $8,389,593.08, of which $6,007,284.28 is allocated to the Customer Communication Management System (CCMS) Contractor for configuration, installation, and implementation activities. Following approval of Decision 39, the Workstream 2 Statement of Work was amended, increasing the ITABC implementation budget by approximately $292,000. As of this reporting period, 88% of the overall implementation budget remains available. The post–Go-Live Maintenance and Operations (M&O) budget totals $6,182,097, including $5,817,298 dedicated to vendor hosting and ongoing maintenance services.		
Overall	**ON TRACK**				
Scope Summary					

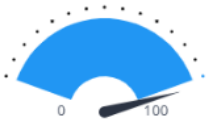
The project will implement a modern Customer Communication Management System to streamline the generation, and delivery of notices. The solution will replace legacy systems, allow for extensibility, and integrate with OnBase for archival purposes (to include all historical artifacts). Out-of-scope items include noticing enhancements outside of foreign language translations capabilities.		
Schedule Summary		
Due to a shift in mandated technology requirements at the beginning of calendar year 24' a new iteration of the RFP was requested and the schedule was baselined. The Design, Development, and Implementation (DDI) phase officially begins with contractor kickoff on November 3, 2025, following contract execution on October 1, 2025. Over the next year, the team will conduct Joint Application Design (JAD) sessions, system configuration, and testing cycles leading up to User Acceptance Testing in mid-2026. Final Go-Live and transition to Maintenance and Operations remain targeted for December 2026.		
Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$8,681,593.08	$8,681,593.08	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$6,182,097	$6,182,097	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$14,863,690.08	$14,863,690.08	**ON TRACK**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

IEENTC Schedule Variance

Initial Estimate to Current Baseline

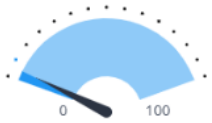
Over Schedule (Increase, in days)



947

Initial Estimate to Current Baseline

% Over Schedule



429%

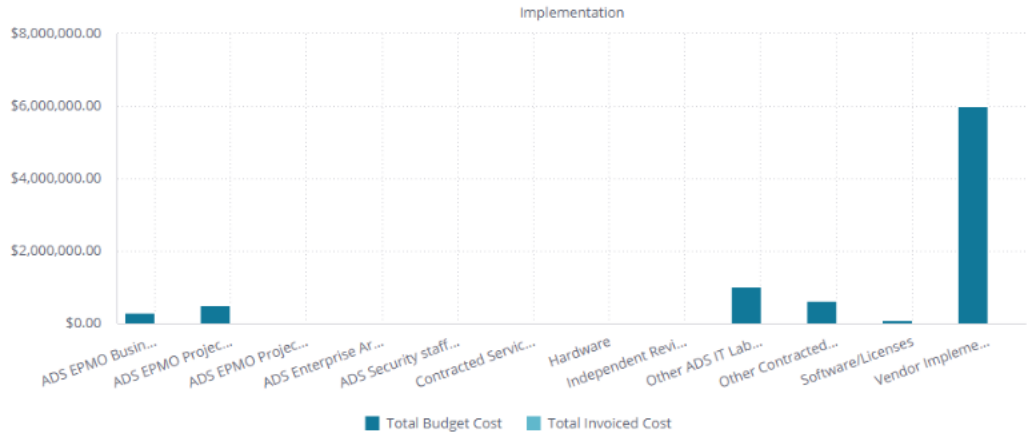
Schedule Estimates

Estimate Name	Estimate Stage	Change Date	Project Start Date	Project End Date	Change Narrative
Baseline at Contracting Start-Finish Dates	Baseline at Contracting	11/24/25	5/27/22	1/1/27	Baseline scheduled develo

IEENTC Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS VDH Medical Practice Board Licensing Sys Replacement (MBL)				
Agency/Department	Agency of Human Services (AHS) Department of Health		**Current Project Phase**		Execution
Original Project Start Date	8/14/2023	**Original Project Estimated End Date**	5/1/2026	**Number of Change Orders Approved**	2
Actual Start Date	1/24/2025	**Current Estimated End Date**	5/1/2026		

Project	Status	Update
Scope	**ON TRACK**	The project is currently in the execution stage, with sprint 4 of 6 underway. We are on track to meet our timeline, with an expected go-live date on or before March 27, 2026.
Schedule	**ON TRACK**	The project is currently in the execution stage, with sprint 4 of 6 underway. We are on track to meet our timeline, with an expected go-live date on or before March 27, 2026.
Budget	**ON TRACK**	The project remains within the originally planned budget, with one exception: a change request for automated address validation. This service incurs an annual subscription fee of $2,300, resulting in a $11,500 cost increase over the 5-year contract term. The automated address validation enhances efficiency and consistency in operations.
Overall	**ON TRACK**	

Scope Summary

The Agency of Human Services (AHS) Medical Practice Board Licensing (MBL) project is the procurement of a new Software as a Service (SaaS) solution to migrate from the current licensing system to an implementation of a new system that includes all desired features and configuration of the current system to Vermont specific data and workflow requirements.

Schedule Summary

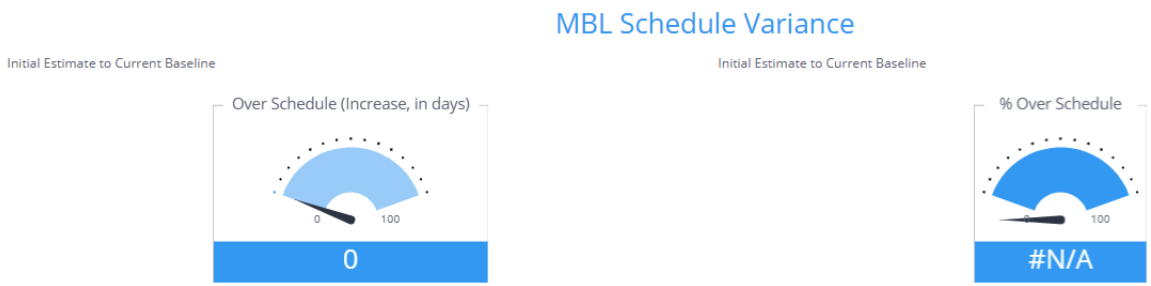
The project is on track according to the original plan, with a targeted go-live date on or before March 27, 2026.

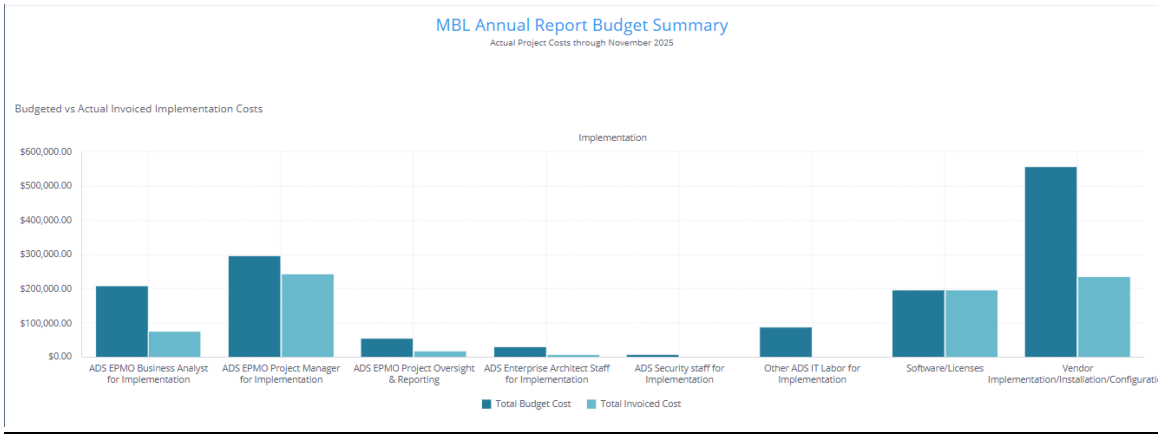
Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget

$1,427,486.71	$1,442,006.71	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$1,221,903.10	$1,221,903.10	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$2,649,389.81	$2,663,909.81	**ON TRACK**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts





IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS VDH StarLIMS System Upgrade				
Agency/Department	Agency of Human Services (AHS) Department of Health		**Current Project Phase**		Closing
Original Project Start Date	2/8/2022	**Original Project Estimated End Date**	4/30/2025	**Number of Change Orders Approved**	7
Actual Start Date	4/10/2023	**Current Estimated End Date**	4/30/2025		

Project	Status	Update
Scope	**ON TRACK**	The StarLIMS v12 upgrade was successfully launched on February 10, 2025.
Schedule	**MANAGEABLE RISKS**	The project schedule was adjusted due to an extended period required for document reviews and the incorporation of change orders. As a result, the project completion date was moved from the original target of July 31, 2024, to April 30, 2025.
Budget	**ON TRACK**	The budget was increased to accommodate additional project management and VDH-IT costs resulting from the project extension. However, the project completed below the rebaselined costs.
Overall	**ON TRACK**	

Scope Summary

The AHS VDH StarLIMS System Upgrade project has been successfully completed, marking a significant enhancement in the security, performance, and functionality of the Vermont Department of Health Laboratory's Laboratory Information Management System (LIMS). By upgrading to the latest version, the VDHL now operates on a modern and secure platform.
The project focused on implementing critical improvements to maintain system security and compliance. With the upgrade, the latest security measures have been integrated, ensuring that the system meets necessary compliance standards and safeguarding sensitive laboratory data against potential security threats.

Schedule Summary

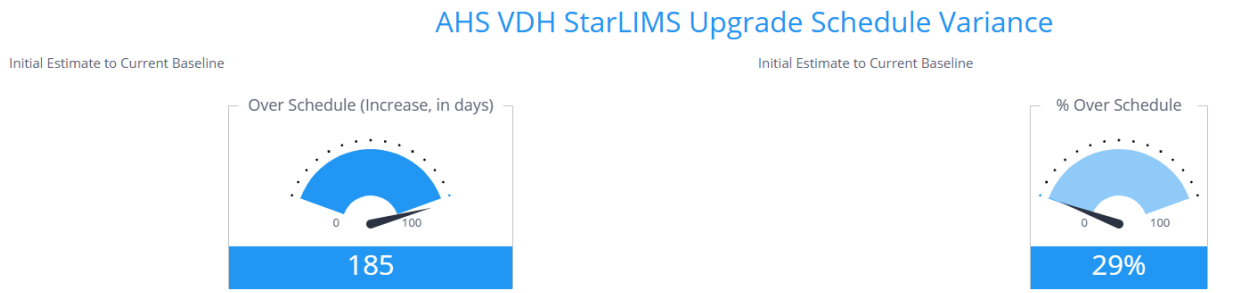
The project successfully went live on February 10, 2025.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget

$1,011,067.50	$1,258,909.50	**OVER BUDGET**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$1,300,000	$1,300,000	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$2,311,067.50	$2,558,909.50	**OVER BUDGET**
Solution Lifecycle Years	5	

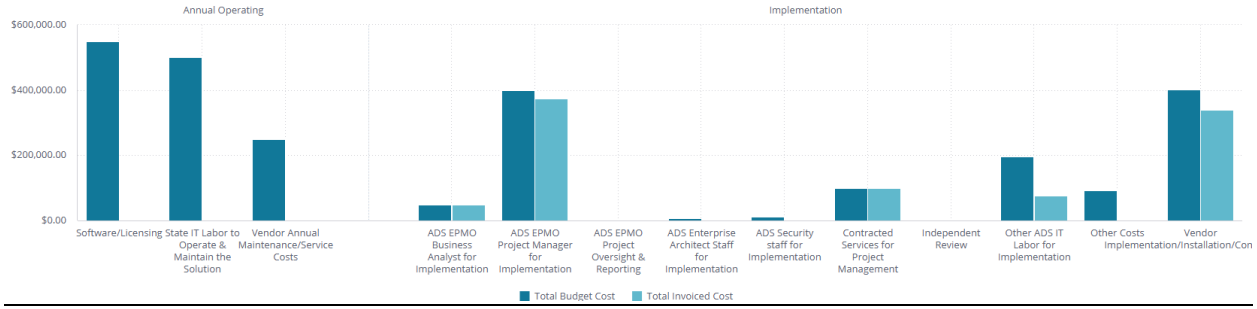
Schedule Variance and Budget to Actuals Estimate



AHS VDH StarLIMS Upgrade Budget Summary

Actual Project Costs through December 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS DVHA HIE - VHIE Connectivity SFY26				
Agency/Department	Agency of Human Services (AHS) Department for Vermont Health Access		**Current Project Phase**		Execution
Original Project Start Date	8/1/2025	**Original Project Estimated End Date**	7/31/2026	**Number of Change Orders Approved**	0
Actual Start Date	8/1/2025	**Current Estimated End Date**	7/31/2026		
Project	**Status**		**Update**		
Scope	**ON TRACK**		The scope of VHIE Connectivity project is currently on track, with all deliverables progressing according to the approved scope and timeline in the SFY26 VITL Contract. The SFY26 August Connectivity Dashboard Deliverables review has been completed, and the associated milestone was achieved on schedule on 9/30; we do not anticipate any delays or disruptions with monthly or upon completion deliverables at this stage. The Deliverables Expectations Documents for the following work streams have been approved: Contributing Interfaces, Results Delivery Interfaces Expand Bi-Directional Interfaces, Expand ELR interfaces. Connect to AIRA AART system, Convert batch Immunization files to HL7, Implement Newborn screening HL7 Interface, Design and Implement recommended solution for adding Insurance information VDH and VITL MOU agreement is currently routing for signatures. Scope risk exposure is currently low, with ongoing monitoring in place to proactively address potential issues and maintain smooth project progression.		
Schedule	**ON TRACK**		VHIE Connectivity project schedule is currently on track, with all deliverables progressing according to the approved scope and timeline. The SFY26 August Connectivity Dashboard Deliverables review has been completed, and the associated milestone was achieved on schedule on 9/30; we do not anticipate any delays or disruptions with monthly or upon completion deliverables at this stage. Connectivity Deliverables Expectations Documents		

		development has been completed in September on schedule. Public Health Deliverables Expectations Documents development is on track and will be finalized in November. Bi-Weekly Progress status reports from the vendor are on track.
Budget	**ON TRACK**	Budget performance remains aligned with projections and the contract obligations. Payments are based on the review of the Monthly Connectivity Dashboard deliverable, Bi -Weekly Status Reports, and upon completion Interface and Public Health deliverables. Acceptance of monthly and upon completion deliverables, invoices are paid based on the Deliverables Acceptance Documents, with the next milestone, VITL invoice for SFY26 September Deliverables expected during the week of 11/3.
Overall	**ON TRACK**	

Scope Summary

This scope includes expanding the number and types of data contributors and ensuring that patients and providers have meaningful access to health information through direct EHR integrations, care coordination platforms, and a clinician-facing portal. In alignment with federal regulations such as the CMS Interoperability and Patient Access Final Rule and ONC's USCDI requirements, the project emphasizes enabling FHIR API connectivity for both organizational and individual users. These APIs will allow secure and standardized bidirectional exchange of health records, ensuring VHIE stakeholders and patients can electronically access and share data as required.

To strengthen public health collaboration, the project advances the bidirectional exchange of immunization and reportable condition data between the VHIE and the Vermont Department of Health. This includes expanding the Immunization Bidirectionality (IBID) program, enhancing Electronic Lab Reporting (ELR) interfaces, and connecting to national immunization analysis tools like AIRA's AART. Additional deliverables include HL7 conversions for batch data senders, newborn screening integration, and sharing insurance information to support vaccine distribution planning. All interface development will adhere to NIST and VDH specifications, ensuring compliance, data quality, and real-time value at the point of care.

The project scope also includes managing the development and review of Deliverables Expectations Documents (DEDs), overseeing the tracking, completion, and review of monthly, quarterly, and final deliverables, producing, reviewing, and approving Deliverables Acceptance Documents, facilitating communication and coordination with VITL and other stakeholders, and executing risk management activities to support project continuity and accountability.

Schedule Summary

The schedule for the DDI deliverables will follow a DED process

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget

$1,548,542	$1,548,542	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
0	0	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$1,548,542	$1,548,542	**ON TRACK**
Solution Lifecycle Years	1	

Schedule Variance and Budget to Actuals Charts

AHS VHIE Connectivity 2025 Project Schedule Variance

Initial Estimate to Current Baseline

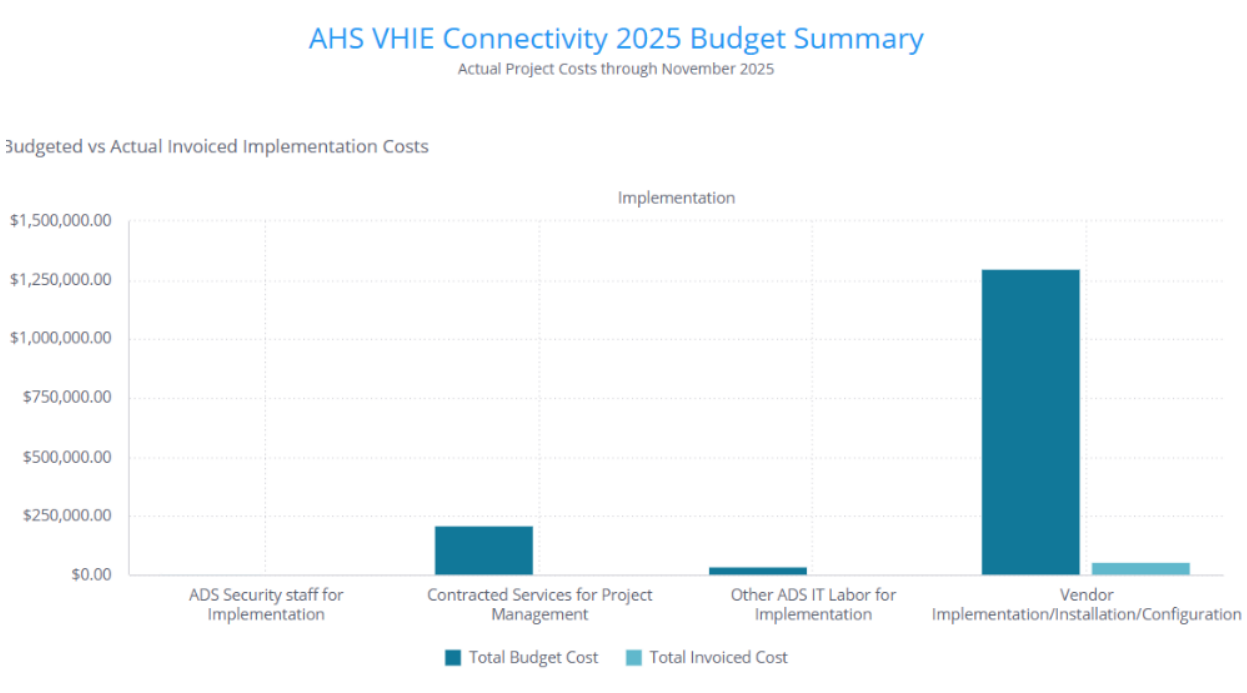
Over Schedule (Increase, in days)

0

Initial Estimate to Current Baseline

% Over Schedule

#N/A


AHS VHIE Connectivity 2025 Budget Summary
Actual Project Costs through November 2025
Budgeted vs Actual Invoiced Implementation Costs
Implementation
$1,500,000.00
$1,250,000.00
$1,000,000.00
$750,000.00
$500,000.00
$250,000.00
$0.00
ADS Security staff for Implementation
Contracted Services for Project Management
Other ADS IT Labor for Implementation
Vendor Implementation/Installation/Configuration
Total Budget Cost
Total Invoiced Cost

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS VHIE -Maintenance & Operations SFY26				
Agency/Department	Agency of Human Services (AHS) Department for Vermont Health Access		**Current Project Phase**		Execution
Original Project Start Date	8/1/2025	**Original Project Estimated End Date**	7/31/2026	**Number of Change Orders Approved**	0
Actual Start Date	08/01/2025	**Current Estimated End Date**	7/31/2026		

Project	Status	Update
Scope	**ON TRACK**	The scope of VHIE MO project is currently on track, with all deliverables progressing according to the approved scope and timeline. The SFY26 August Deliverables review has been completed, and the associated milestone was achieved on schedule on 9/30; we do not anticipate any delays or disruptions with monthly or upon completion deliverables at this stage. Deliverables Expectations Documents development is currently in progress and on schedule. Outcomes based certification metrics are now reported monthly due to the changes in required CMS reporting. This has been reflected in the SFY26 Contract Amendment executed on August 8, 2025.
Schedule	**ON TRACK**	Schedule is on track. Monthly Deliverables are received for review on the 10th of each month and upon completion deliverables are following the schedule defined and approved in the Deliverables Expectations Documents. Outcomes based certification metrics are now received monthly due to the changes in required CMS reporting.
Budget	**ON TRACK**	Budget performance remains aligned with projections and the contract obligations. Payments are based on the review and acceptance of monthly and upon completion deliverables, invoices are paid based on the Deliverables Acceptance Documents , with the next milestone, VITL invoice for SFY26 September Deliverables expected during the week of 11/3.
Overall	**ON TRACK**	

Scope Summary
The AHS VHIE Maintenance & Operations project plays a crucial role in ensuring the smooth operation and compliance of the Vermont Health Information Exchange (VHIE). By managing all aspects of the VITL Sole Source Contract for the SFY25/SFY26 operations and maintenance, HIE Program is committed to maintaining the integrity and effectiveness of VHIE. Overall, the project ensures VHIE receives the support needed for its ongoing operation, benefiting healthcare providers and patients in Vermont by facilitating seamless health information exchange and supporting better healthcare outcomes. 2025-2026 Deliverables: VHIE System Operations (Monthly): The contractor will ensure the smooth running of the VHIE by maintaining its technical infrastructure, software, hardware, and architecture and meeting all service and operational requirements to demonstrate efficient and effective system operation. Collaborative Services Architecture (Monthly and Upon Completion): Continue to support the Medicaid Data Warehouse & Analytics Solution (MDWAS) scope and as supported by contract budget. This will include VHIE- related support for CMS certification of the MDWAS. Scope includes · Managing Development of the Deliverables Expectations Documents Managing and Reviewing Monthly and Quarterly and Upon Completion Deliverables and ensuring federal and state compliance via Outcome Based Certification (OBC) Measures.
Schedule Summary
Project is currently on track and the latest milestone deliverables received on time

Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$586,000	$586,000	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$5,923,894.16	$5,923,894.16	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$6,509,894.16	$6,509,894.16	**ON TRACK**
Solution Lifecycle Years	1	

Schedule Variance and Budget to Actuals Charts

AHS VHIE M&O 2025 Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

0

Initial Estimate to Current Baseline

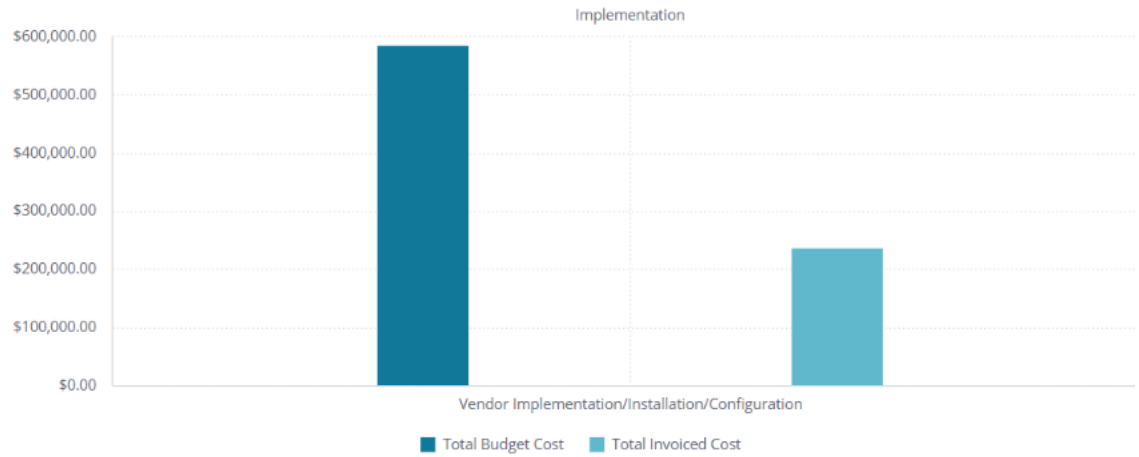
% Over Schedule

#N/A

AHS VHIE M&O 2025 Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS VHIE -MDAAP and SLAIT SFY26				
Agency/Department	Agency of Human Services (AHS) Department for Vermont Health Access		**Current Project Phase**		Execution
Original Project Start Date	7/1/2025	**Original Project Estimated End Date**	3/31/2026	**Number of Change Orders Approved**	0
Actual Start Date	7/1/2025	**Current Estimated End Date**	3/31/2026		
Project	**Status**		**Update**		
Scope	**ON TRACK**		Project scope remains firmly aligned with the approved MDAAP objectives and MDAAP Payment Protocol and no new scope changes have been introduced. Scope execution risk is low, and alignment between the State and VITL continues to track accordingly. MDAAP has stopped accepting new applications for connectivity tracks. There will be a November deadline for participants in Track 5, VITL Access. Providers continue to work towards milestones within their enrolled track. VITL continues facilitating Security Risk Assessments of providers' EHRs and workspace. MDAAP Audit Plan: Risk assessments for the 1st round of audits have been completed and documented in a case management database, following MDAAP Audit Plan procedures. Audits are in process and supporting documentation is being gathered. Documentation is saved in an audit specific folder, and standardized templates are being used to review program eligibility and milestones.		
Schedule	**ON TRACK**		The VHIE MDAAP and SLAIT SFY26 project is currently on track, with all deliverables progressing according to the approved timeline. There are no anticipated delays or disruptions with monthly or upon completion deliverables at this stage. Milestones must be attested to by December 1st, 2025, and all correct documentation must be submitted by December 15, 2025. Deliverables Expectations Document for the SFY26 contract scope is currently under review with the MDAAP State Team with the		

		plans to finalize the review by 10/31. Bi-Weekly Progress status reports from the vendor are on track.
Budget	**ON TRACK**	Budget performance remains aligned with projections and contractual obligations. Payments continue to be based on the acceptance of monthly and upon-completion deliverables under the existing VITL agreement.
Overall	**ON TRACK**	

Scope Summary

The scope of the Medicaid Data Aggregation and Access Program (MDAAP) and State Level Repository, Attestation, and Incentive Tracking System (SLAIT) SFY26 Project focuses on improving connectivity and data sharing among Medicaid providers, particularly those in mental health, substance use, long-term services and supports, and school-based electronic medical record (EMR) systems, while reducing provider burden and supporting care coordination. The project scope includes establishing interface connectivity, data integration into the VHIE, aiding with the security risk assessments, executing service agreements, supporting onboarding activities and training for providers and supervisory units to use health data effectively and securely. Scope also includes project management support for State Level Repository, Attestation, and Incentive Tracking System maintenance and operations, the system used to properly track and report on EHR incentives paid out by MDAAP.

Schedule Summary

The schedule for the DDI deliverables will follow a DED process

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$398,825	$398,825	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$22,514	$22,514	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$421,339	$421,339	**ON TRACK**
Solution Lifecycle Years	**1**	

Schedule Variance and Budget to Actuals Charts

AHS VHIE MDAAP and SLAIT 2025 Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

0

Initial Estimate to Current Baseline

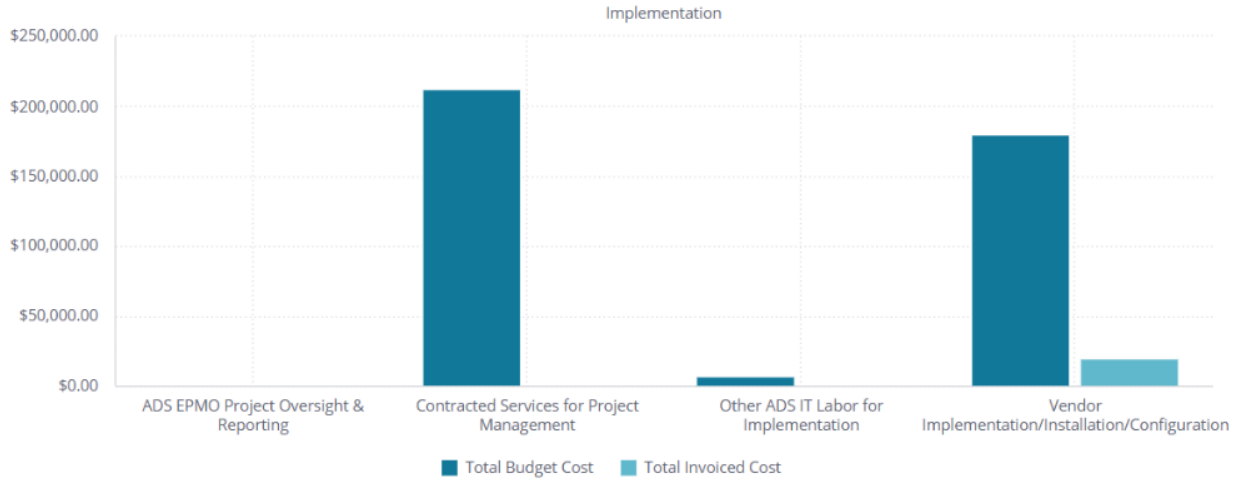
% Over Schedule

#N/A

AHS VHIE MDAAP and SLAIT 2025 Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AHS VHIE Unified Health Data Space (UHDS)				
Agency/Department	Agency of Human Services (AHS) Department for Vermont Health Access		**Current Project Phase**		Execution
Original Project Start Date	7/1/2025	**Original Project Estimated End Date**	6/30/2026	**Number of Change Orders Approved**	0
Actual Start Date	7/1/2025	**Current Estimated End Date**	6/30/2026		

Project	Status	Update
Scope	**ON TRACK**	Project scope remains firmly aligned with the approved UHDS objectives and no new scope changes have been introduced. All paused deliverables have resumed review following vendor selection, and the governance framework is being finalized to ensure clear State oversight. Scope execution risk is low, and alignment between the State and VITL continues to track accordingly.
Schedule	**MANAGEABLE RISKS**	The project experienced a short delay in vendor selection due to extended due diligence and governance alignment. This risk and issue are actively managed through joint AHS–VITL coordination and the issue is close to being resolved with final vendor selection in late September. Contracting preparation is now underway, and the overall project timeline remains stable with minimal downstream impact expected.
Budget	**ON TRACK**	Budget performance remains aligned with projections and contractual obligations. Expenditures to date are limited to procurement and pre-implementation activities, with no cost variances reported. Payments continue to be based on the acceptance of monthly and upon-completion deliverables under the existing VITL agreement.
Overall	**ON TRACK**	

Scope Summary

The Unified Health Data Space (UHDS) represents Vermont's next generation Health Information Exchange, evolving from record exchange to a secure, multi-source data ecosystem. Its scope includes upgrading the VHIE platform with FHIR-based APIs, enhanced data repository and analytics capabilities, improved consent management, and stronger access controls such as SSO and MFA. Parallel efforts under VHIE Security focus on

maintaining NIST 800-53 compliance, implementing FHIR-based security labeling, advancing toward MARS-E standards, and conducting regular risk assessments to protect patient data. Future activities tied to Act 167, S.126, and the AHEAD Model will also align under the UHDS framework to support Vermont's long-term health data strategy.
Schedule Summary
The schedule for the DDI deliverables will follow a DED process. For the NIST deliverables (Operations) VITL will follow a predetermined schedule as presented in the NIST Requirements table.

Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$3,191,200	$3,191,200	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$1,315,960.04	$1,315,960.04	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$4,507,160.04	$4,507,160.04	**ON TRACK**
Solution Lifecycle Years	1	

Schedule Variance and Budget to Actuals Charts

Unified Health Data Space (UHDS) Project Schedule Variance Last refreshed Dec 1 3:20 pm

Unified Health Data Space (UHDS) Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

0

Initial Estimate to Current Baseline

% Over Schedule

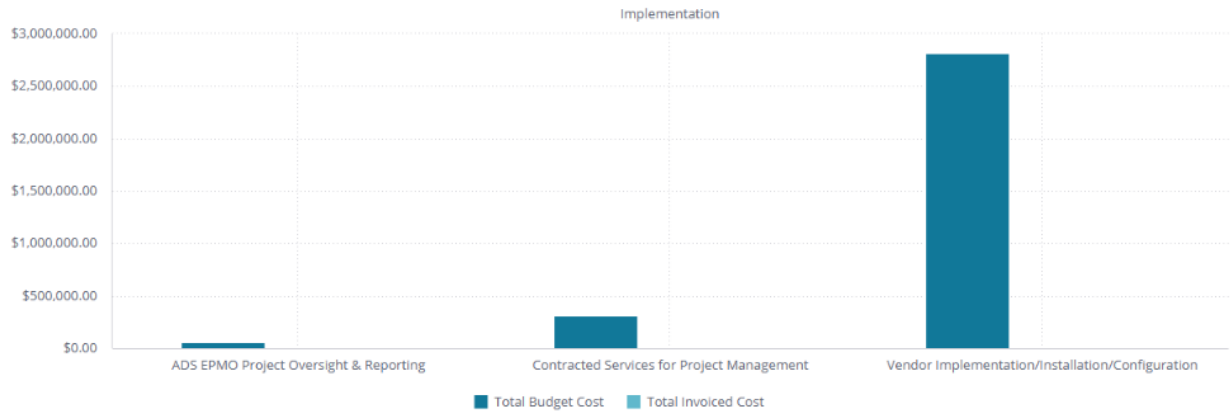
#N/A

Unified Health Data Space (UHDS) Annual Report Budget Summary Last refreshed Dec 1 3:20 pm Le

AHS VHIE Unified Health Data Space (UHDS) 2025 Annual Report Budget Summary

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs



Agency of Natural Resources (ANR)

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	ANR - FPR - Vermont State Parks Internet Services				
Agency/Department	Agency of Natural Resrouces (ANR) Forests Parks and Recreation		**Current Project Phase**		Execution
Original Project Start Date	6/1/2022	**Original Project Estimated End Date**	8/31/2026	**Number of Change Orders Approved**	0
Actual Start Date	7/30/2025	**Current Estimated End Date**	8/31/2026		

Project	Status	Update
Scope	**ON TRACK**	The project is in progress as the project team, vendor, and other interested parties are negotiating the contract and preparing to begin work through 2026.
Schedule	**ON TRACK**	The project has returned to active project this year, and the schedule is currently on track for completion in late 2026.
Budget	**ON TRACK**	The project is in process as the project team continues negotiations with the chosen vendor. The project has a budget of $1.6 million, all of which is ARPA funds that need to be spent or lost by the end of calendar year 2026. The project has spent $25,960.00 as of September, entirely on ADS costs. The plan for the contract is to establish project minimum deliverables, and expand the locations to receive fiber as the budget and calendar allow.
Overall	**ON TRACK**	

Scope Summary

The ANR FPR VT State Parks Internet Services project is a significant initiative aimed at enhancing internet connectivity and support for all Vermont State Parks. By contracting with a single vendor, we aim to improve the reliability, performance, and overall quality of internet services provided to park visitors and staff. Reliable and high-quality internet connectivity is essential for enhancing the visitor experience at Vermont State Parks. It enables visitors to access online resources, stay connected with loved ones, and utilize digital tools for recreational and informational purposes. By improving internet services, we can enhance the overall park experience and meet the expectations of modern-day visitors. The project will focus on improving the reliability of internet connectivity, ensuring that visitors and staff have consistent access to the internet throughout the park grounds. This will involve implementing robust infrastructure and technologies to minimize downtime and disruptions. By enhancing reliability, we can provide a seamless and uninterrupted internet experience for park users. In addition to reliability, the project aims to improve the performance of internet services. This includes increasing internet speeds and bandwidth to accommodate the growing demand for online activities and services. By providing

faster and more efficient internet connectivity, we can enhance the overall user experience and support a wide range of digital applications and services. Furthermore, the project will ensure comprehensive support for internet services at Vermont State Parks. The contracted vendor will be responsible for coordinating and managing all aspects of internet services, including troubleshooting, maintenance, and technical support. This will provide park staff with a single point of contact for any internet-related issues, streamlining the support process and ensuring timely resolution of problems. The ANR FPR VT State Parks Internet Services project represents our commitment to enhancing connectivity and support for Vermont State Parks. By improving reliability, performance, and support of internet services, we aim to provide visitors and staff with a seamless and reliable online experience. This project will contribute to the overall enjoyment and accessibility of Vermont State Parks, supporting their mission to provide exceptional outdoor recreational opportunities for all. 91 We remain dedicated to implementing the necessary improvements and working closely with the contracted vendor to ensure the successful delivery of reliable and high-quality internet services to all Vermont State Parks. Through this project, we are enhancing connectivity and supporting the continued success of our state parks system.

Schedule Summary

The project has been restarted this year and the project team has made great progress. Bids for the project were received in April, the ADS PM was added to the team in June, and the winning vendor was chosen in August. Currently, the project team is working with the vendor on redlining before the IR begins this month. The overall project schedule is fairly straightforward, as the ARPA funds for this project must be spent be the end of calendar year 2026, giving us the majority of that year to complete all necessary construction and implementation efforts.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$1,544,186	$1,544,186	ON TRACK
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$274,447	$274,447	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$1,818,633	$1,818,633	ON TRACK
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

ANR FPR Connectivity Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

0

Initial Estimate to Current Baseline

% Over Schedule

0%

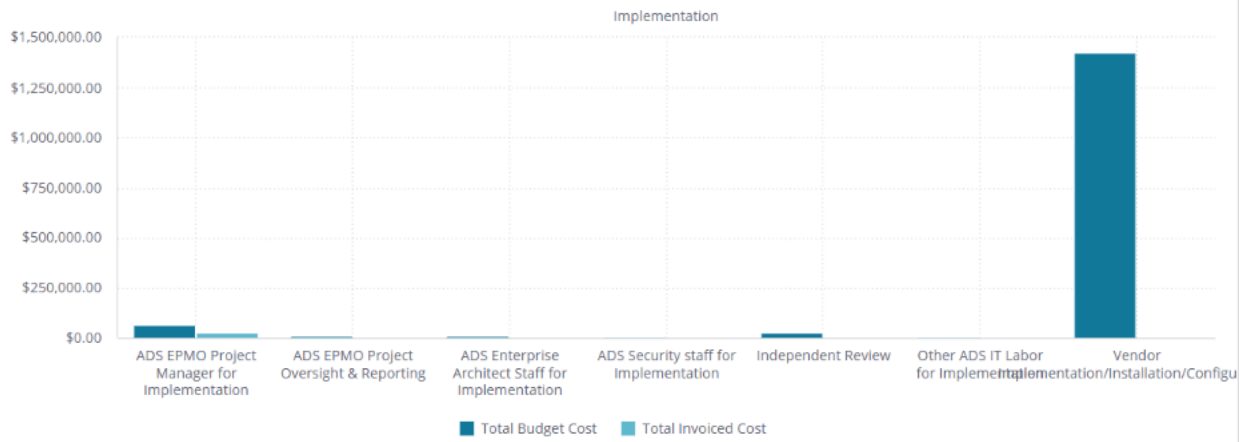
Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Estimated Project Start Finish Dates @ Contracting	Baseline at Contracting	6/1/22	12/31/26	The project is on schedule with no changes required.

ANR FPR Connectivity Budget Summary

Actual Project Costs through October 2025

Budgeted vs Actual Invoiced Implementation Costs



Agency of Transportation (AOT)

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AOT (VAMIS) Vermont Asset Management Information System.				
Agency/Department	Agency of Transportation (AOT)		**Current Project Phase**		Execution
Original Project Start Date	6/15/2018	**Original Project Estimated End Date**	12/30/2025	**Number of Change Orders Approved**	3
Actual Start Date	6/15/2018	**Current Estimated End Date**	12/30/2025		
Project	**Status**		**Update**		
Scope	**ON TRACK**		Phase 1 and 2 of the project is finished and fully operational. In Phase 3, additional assets were integrated into the VAMIS system, and the Operations and Management (O&M) component was developed. The O&M component will enable the Agency to align the work of the Maintenance Districts with the overall asset investments across the network.		
Schedule	**ON TRACK**		The project kicked off in February 2017, with the vendor implementation and support/maintenance contract signed in August 2019. The maintenance and operation part of this contract is scheduled to conclude in December 2030. During the implementation phase of the vendor contract, three amendments were made for phases 2(A), 2(B), and 3, extending the implementation efforts through December 2025. This extension covers 64 four-week sprints throughout the project's duration.		
Budget	**ON TRACK**		The project was planned to be implemented in multiple phases. Initially, the cost baseline at the time of contract execution was set at $2,395,317. Following the approval of the first vendor contract amendment, the total project budget increased to $3,860,939. A second vendor contract amendment was approved, revising the budget to $12,076,740. In December 2024, a third and final vendor contract amendment was executed, reflecting a minor budget increase due to ongoing ADS project oversight labor charges for the remaining implementation activities. Currently, project cost for October 2025 is $11,958,288.13.		
Overall	**ON TRACK**				

Scope Summary
The Vermont Asset Management Information System (VAMIS) project by the Agency of Transportation (AOT) is a major initiative designed to enhance asset tracking, management, and decision-making. By adopting a transportation asset management information system, the project aims to boost the efficiency and effectiveness of managing AOT program assets. This involves configuring the Deighton Asset Management Information System (dTIMS) to handle the asset data managed by AOT. The system will act as a centralized platform for tracking and analyzing various asset categories, such as Rail, Pavements, Short Structures, Small Culverts, and Signs. Consolidating asset data into a single system will streamline operations and improve data accuracy and accessibility. The VAMIS project will also integrate Operation Management (O.M.) and Business Analytics (BA) modules, offering comprehensive analysis and reporting capabilities. These modules will facilitate detailed analysis of asset data, enabling informed decision-making and strategic planning. By utilizing business analytics, the project aims to identify trends, predict asset performance, and optimize resource allocation. Implementing VAMIS will allow AOT to incorporate asset data into business processes, enhancing operational efficiency and effectiveness. This data-driven approach will support informed decisions regarding asset maintenance, repair, and replacement, ensuring optimal performance and longevity of transportation systems. Building toward the right treatment, for the right asset, at the right time. Additionally, the project seeks to increase the value of AOT assets by effectively managing and maintaining them, thereby maximizing their lifespan and minimizing lifecycle costs. This will lead to improved asset performance, reduced downtime, and enhanced overall reliability of the transportation system. The VAMIS project underscores the agency's commitment to leveraging technology and data to improve asset management and decision-making. By implementing a comprehensive asset management system, AOT is streamlining operations, enhancing data-driven decision-making, and increasing the value of its assets. The agency is dedicated to the successful implementation of VAMIS, ensuring it has the necessary tools and capabilities to effectively track, manage, and make informed decisions about transportation assets. Through this project, AOT is advancing asset management practices and supporting the efficient operation of Vermont's transportation systems.
Schedule Summary
The project is currently in its 48th sprint and remains on schedule to conclude in December 2025. Each asset development sprint lasts four weeks.

Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$12,774,956.21	$1,2733,695.34	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$3,480,332.20	$5,534,369.00	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$16,255,288.41	$18,268,064.34	**ON TRACK**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

AOT - (VAMIS) Vermont Asset Management Information System - Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

1,609

Initial Estimate to Current Baseline

% Over Schedule

396%

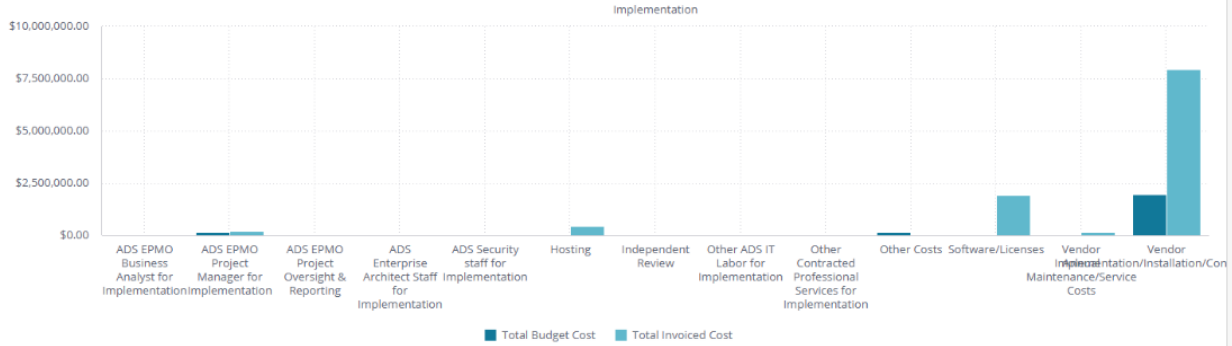
Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Estimated Project Start-Finish Dates	Baseline 3	3/5/18	10/30/24	Amendment #1 Approved 1/6/2023
	Baseline 4	3/5/18	10/30/24	Baseline 4. IT ABC Form Approved 11/17/22.
	Baseline 5	3/5/18	12/31/25	Contract Amendment #3. Extending the project 12 months and adding scope. IT ABC Form Approved 3/1
	Baseline at Contracting	3/5/18	9/23/19	Baseline at Contracting
Initial Estimated Project Start-Finish Dates	Initial Estimate	3/5/18	12/31/21	Initial Estimate. IT ABC Form Approved 5/28/20.

AOT - (VAMIS) Vermont Asset Management Information System - Annual Report Budget Summary

Actual Project Costs through December 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AOT - DMV - Core Systems Replacement				
Agency/Department	Agency of Transportation (AOT) Department of Motor Vehicles		**Current Project Phase**		Closing
Original Project Start Date	7/1/2021	**Original Project Estimated End Date**	12/12/2025	**Number of Change Orders Approved**	0
Actual Start Date	6/13/2022	**Current Estimated End Date**	12/12/2025		
Project	**Status**		**Update**		
Scope	**ON TRACK**		The baseline scope for the DMV Core Modernization project includes two releases: Vehicle Services (VS) and Driver Services (DS). VS was completed and went live on 11/13/23, including: vehicle titling, registration, and renewals; impound records; dealer licensing & regulation; plate, decal, temporary and single-use permit inventory management and Point of Sale. The second release is Driver Services. It kicked off 6/15/2024 and is scheduled to be implemented 11/12/2024. Scope will include: issue & maintain driver's licenses & other identification; support fraud detection, investigation, hearings, scheduling, and management, financial responsibility and the admin & reporting of driver restrictions, convictions, and other info related to driver improvement & control.		
Schedule	**ON TRACK**		The project has two roll outs of 18 months each, one for Vehicle Services (VS) and one for Driver Services (DS) . The VS release successfully completed 11/13/2023. The DS schedule is in progress and on track for completion on 11/12/2025.		
Budget	**ON TRACK**		In March 2024 the budget for DMV Core Modernization project (Vehicle Services & Driver Services) was rebaselined to align vendor costs with Lifecycle Analysis Detail. The costs were increased from $85,180,984.00 to $97,280,480 to account for Appointment Scheduling, increase in equipment costs. Note: The Lifecycle Costs do not include DMV Staff costs. With Actual costs to date equaling $51,581,652.00 paid in Vision as of Oct 31, 2025, including DMV Staff costs. The budget is on track and continues to be closely monitored. Release 1: Vehicle Services - The		

		Legislature approved $24,500,000 in the Spring 2021 session. Release 2: Driver Services - the Legislature approved $20,250,000 in FY23 budget. The Legislature approved funding, in conjunction with the DMV Budget, should be sufficient to implement the FAST DSVS software within the established project begin and end dates.
Overall	**ON TRACK**	

Scope Summary

The AOT DMV Core Systems Replacement project is a significant initiative aimed at enhancing the efficiency and management of operations within the Department of Motor Vehicles (DMV) in Vermont. By replacing the existing core systems, we aim to streamline various functions and improve the overall effectiveness of DMV operations. The new solution will encompass a range of functionalities, including vehicle titling, registration, and renewals. This will enable smoother and more efficient processes for individuals and businesses seeking to title and register their vehicles. Additionally, the solution will manage impound records, ensuring accurate and up-to-date information for impounded vehicles. Dealer licensing and regulation will also be handled by the new system, providing a centralized platform for managing dealer licenses and ensuring compliance with regulations. The solution will also facilitate inventory management for plates, decals, temporary permits, and single-use permits, ensuring accurate tracking and efficient distribution. Furthermore, the solution will be responsible for issuing and maintaining driver's licenses and other identification documents. This includes supporting fraud detection and investigation, managing hearings and scheduling, and handling financial responsibility related to driver restrictions, convictions, and other driver improvement and control information. The system will provide comprehensive administration and reporting capabilities for driver-related data, enabling efficient management and accurate reporting. The AOT DMV Core Systems Replacement project represents our commitment to enhancing the efficiency and effectiveness of DMV operations in Vermont. By implementing a new solution, we aim to streamline processes, improve data accuracy, and provide better services to individuals, businesses, and law enforcement agencies. We remain dedicated to the successful implementation of the new core systems, ensuring that the DMV has the necessary tools and capabilities to manage vehicle titling, registration, dealer licensing, and driver-related functions. Through this project, we are advancing the capabilities of the DMV and supporting the overall transportation infrastructure in Vermont.

Schedule Summary

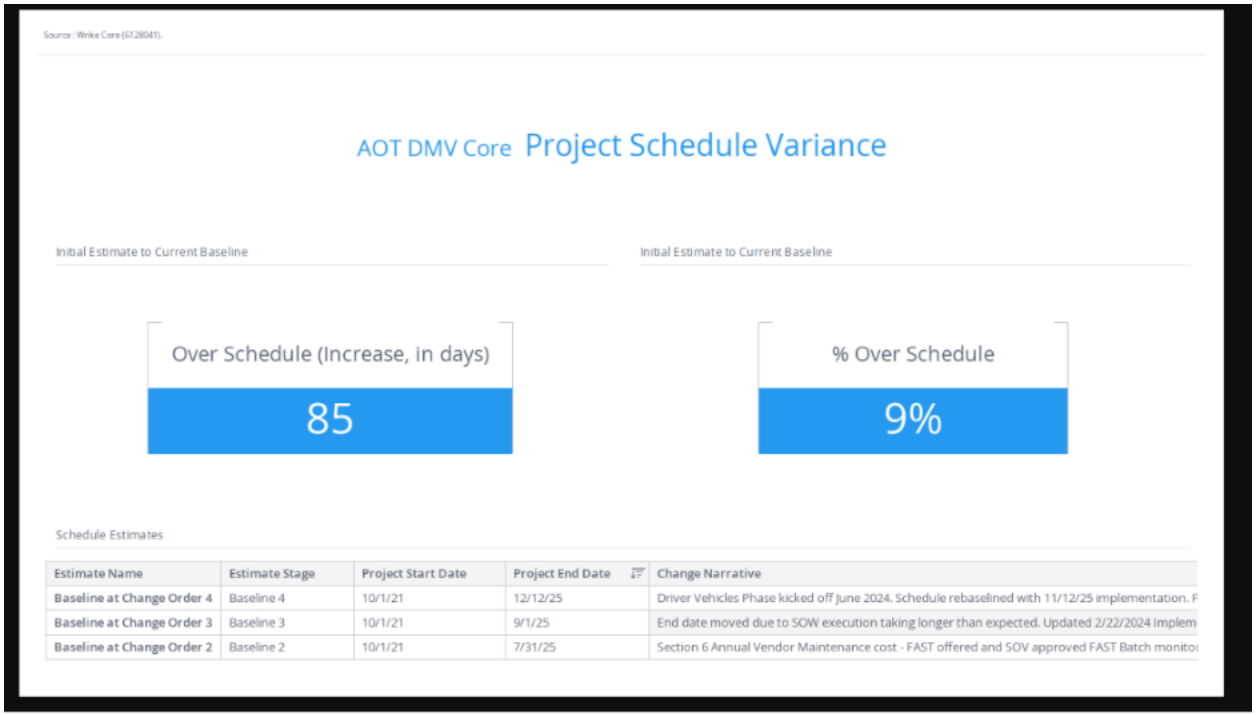
The total implementation project duration is 36 months. There will be two roll outs with 18 months for Vehicle Services (VS) and 18 months for Driver Services (DS). VS was successfully implemented on 11/13/2023. For DS, the schedule is 6/5/2024 - 11/12/2025.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$50,724,790.00	$51,210,563.00	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$41,567,185.00	$46,069,917.00	**ON TRACK**

Total Original Estimated IT Activity Cost	Total Current Estimated State IT Activity Cost	Budget Status – Over or Under Budget
$9,2291,975.00	$97,280,480.00	**ON TRACK**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

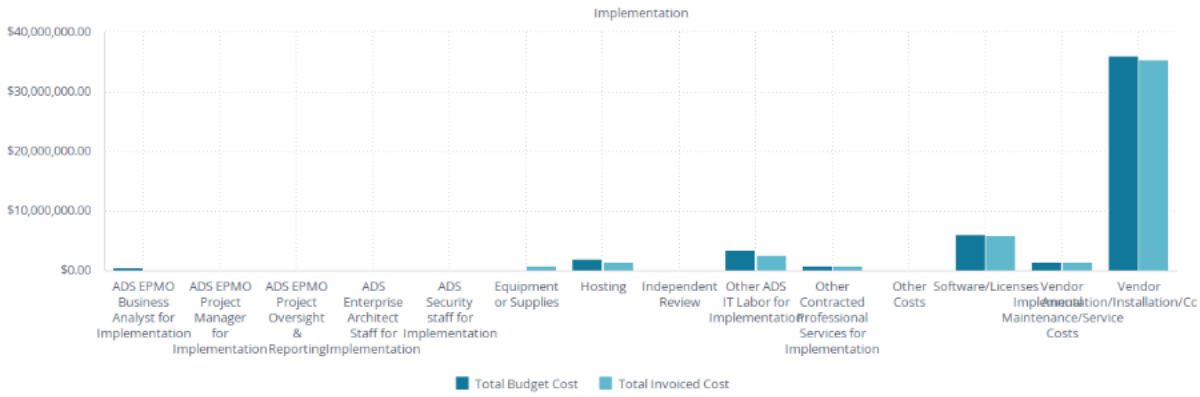


Source : Wrike Core (6128041).

DMV Core Modernization Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AOT DMV ePermitting 2.0				
Agency/Department	Agency of Transportation (AOT) Department of Motor Vehicles		**Current Project Phase**		Execution
Original Project Start Date	12/20/2022	**Original Project Estimated End Date**	1/30/2026	**Number of Change Orders Approved**	0
Actual Start Date	12/9/2024	**Current Estimated End Date**	6/27/2026		

Project	Status	Update
Scope	**ON TRACK**	Scope was baselined with the execution of the implementation contract. No scope concerns have been identified during execution.
Schedule	**ON TRACK**	The contract was fully executed on 12/09/24 with project kickoff. The project is expected to take 13 months and is on track for full solution launch in January 2026.
Budget	**ON TRACK**	Initial estimated costs were $2,456,923.00 but revised to $2,379,468 at contract execution. Actual costs to date are $576,888.56. The project has received a $2M Federal Motor Carrier Safety Administration (FMCSA) Grant for implementation costs.
Overall	**ON TRACK**	

Scope Summary

The AOT DMV ePermitting 2.0 project is a significant initiative aimed at streamlining the process for obtaining oversized/overweight commercial vehicle permits in Vermont. By implementing an electronic permitting system, we aim to provide the trucking industry with a convenient and efficient way to apply for permits and ensure compliance with regulations.

The project will introduce a user-friendly online platform that allows trucking companies to apply for permits electronically.

This platform will be accessible 24/7, providing flexibility and convenience for the industry. Trucking companies will be able to submit permit applications at their convenience, eliminating the need for in-person visits or paper-based processes.

The ePermitting system will also facilitate online payment for permits, if required. This will streamline the payment process, reducing administrative burdens and ensuring timely processing of permits. By enabling electronic payments, we aim to improve efficiency and provide a seamless experience for trucking companies.

The implementation of ePermitting 2.0 will ensure that trucking companies can legally operate on state and municipal highways and roads. By obtaining the necessary permits electronically, they will have the documentation required to comply with regulations and safely transport oversized or overweight loads.

The AOT DMV ePermitting 2.0 project represents our commitment to leveraging technology to enhance the permitting process for the trucking industry. By providing a user-friendly online platform, we aim to streamline operations, reduce administrative burdens, and improve compliance with regulations.
We remain dedicated to the successful implementation of ePermitting 2.0, ensuring that the trucking industry has a convenient and efficient way to obtain oversized/overweight commercial vehicle permits. Through this project, we are supporting the industry's operations while ensuring the safety and integrity of Vermont's highways and roads.

Schedule Summary

The RFP was posted Oct 2023, and a preferred vendor was selected April 2024. The contract start date was 12/09/24, with 13 months planned for implementation. The project is on track for full solution launch in January 2026.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$1,653,868.00	$1,653,868.00	ON TRACK
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$725,600.00	$725,600.00	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$2,379,468.00	$2,379,468.00	ON TRACK
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

.AOT DMV ePermitting Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

0

Initial Estimate to Current Baseline

% Over Schedule

0%

Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Estimate at Contracting	Baseline at Contracting	12/9/24	2/27/26	Estimate at contracting.
Initial Estimated Project Start-Finish Dates	Initial Estimate	2/1/23	6/27/25	Initial estimate.

AOT DMV ePermitting Budget Summary

Actual Project Costs through October 2025

Budgeted vs Actual Invoiced Implementation Costs

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AOT - HD - Construction Management System (CMS)				
Agency/Department	Agency of Transportation (AOT)		**Current Project Phase**		Closing
Original Project Start Date	6/27/2019	**Original Project Estimated End Date**	1/30/2026	**Number of Change Orders Approved**	11
Actual Start Date	7/9/2018	**Current Estimated End Date**	12/1/2026		
Project	**Status**		**Update**		
Scope	**MANAGEABLE RISKS**		Scope is being controlled within bounds of contract. Out-of-scope items identified during elicitation are managed using prioritization and minimum-viable-product model, with highest priority items approved as enhancements. Twelve Change Orders have been executed to date to refactor schedule and allow for needed functionality not included the base contract.		
Schedule	**ON TRACK**		The project is currently entering the closing phase with all modules completed. The final module go-live occurred in September 2025, a four month delay from original estimates.		
Budget	**MANAGEABLE RISKS**		In 2017, the baseline budget for the CMS replacement project was approved, The approved budget was for $3,679,200 in implementation costs and a total 20-year lifecycle cost of $17,178,576. In 2020 the budget was revised to account for changes identified outside contract scope deemed necessary to allow for current systems to be replaced. The 2020 implementation budget was increased to $9,325,236.22 with total 5-year lifecycle cost of $10,834,754.48. This budget reflected the first six change requests executed against the project. The contract is currently being extended to 2030, and incorporating all implementation change orders processed to date. These changes will result in an expected implementation cost of $6,262,477.28 and a total lifecycle cost of $10,947,946.32. To date, the state has incurred $5,492,920.45 in implementation costs and $7,163,277.03 in total lifecycle costs.		
Overall	**MANAGEABLE RISKS**				
Scope Summary					

The baseline scope includes the implementation of a Software as a Service (SaaS) solution which enables the end-to-end source-to-pay procurement functionality for the State of Vermont. There are multiple enhancements that require change orders that add scope to the original scope of work. The Executive Steering Committee (ESC) and the Project Management Team have evaluated all needed changes to the solution and approved change orders to authorize funding for these changes to be made. A contract amendment is currently being negotiated to incorporate all approved change orders and extend the license and support term to 2030.		
Schedule Summary		
The baseline schedule for CMS was established in 2018 on contract execution and had an expected completion of 2021. The schedule was revised in 2020 to extend the completion date to 2025 based on estimated changes needed to accomplish features not covered in the base contract. The first phase (Contracts and Estimation) had a go-live date of March 2021. The second phase (Construction and Materials) had a go-live date of Feb 22, 2024. The last phase (Civil Rights, Mobile and Enhancements) had a go-live date in September of 2025. The project is now entering the closing phase with implementation activities expected to complete by the end of November.		
Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$9,505,220.14	$6,262,477.99	**OVER BUDGET**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$1,511,090.00	$4,685,468.33	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$11,016,310.14	$10,947,946.32	**OVER BUDGET**
Solution Lifecycle Years	8	

Schedule Variance and Budget to Actuals Charts

AOT Construction Management System Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

1,075

Initial Estimate to Current Baseline

% Over Schedule

88%

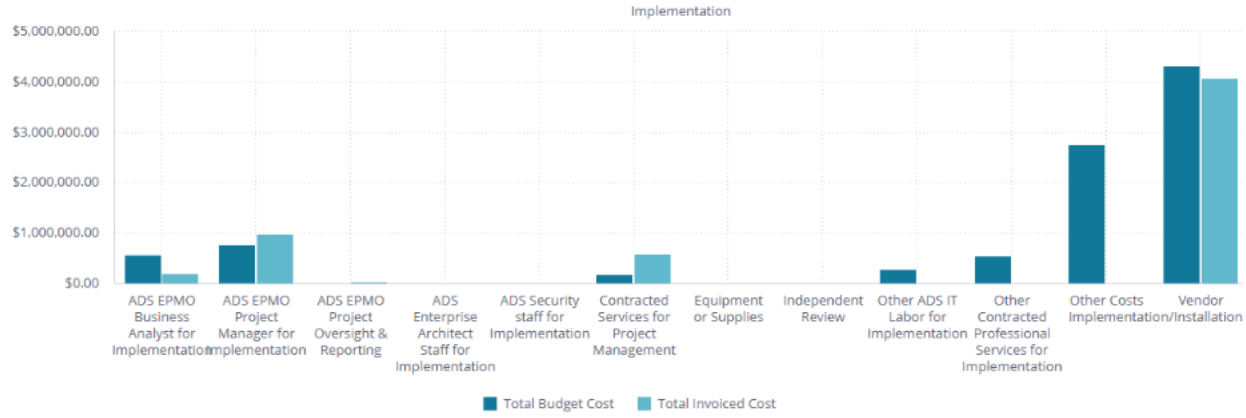
Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Initial Estimated Project Start-Finish Dates	Baseline at Contracting	1/12/17	9/8/21	Contracted implementation start-finish dates
Initial Estimated Project Start-Finish Dates IT ABC	Planning Estimate	1/12/17	9/8/21	Estimated start-finish dates based on proposal
CR 01 Schedule rebaseline	Baseline 2	1/12/17	9/6/23	Change request 1 (signed May 1, 2019) extended the schedule. The business and vendor recognized that the contract estimate did not account for the amount of time needed to elicit detailed requirements for development of customized modules for the electronic bidding system (EBS).
CR 002 Schedule rebaseline	Baseline 3	4/2/20	6/25/24	Change Request 2 (Signed July 11 2019) identified no-cost enhancements to the system and extended the estimated completion date to June 25, 2024
CR011 Schedule Rebaseline	Baseline 4	1/12/17	6/25/25	Change Request 11 (signed July 6, 2022) identified a need for additional enhancements for the materials and Construction subsystem that were required to replace functionality in legacy systems and extended the project implementation completion date to June25, 2025
Contract Amendment / CR012 Schedule Rebaseline	Baseline 5	1/12/17	11/26/25	Change request 12 was an extension of time request to complete mobile and civil rights implementation to November 26, 2025 and the overall contract to 2030.
Contract Amendment 1 Schedule Rebaseline	Baseline 6	1/12/17	11/26/25	Contract amendment 1 authorized an overall contract extension to Jan 30, 2025 with no change to the overall implementation due date.

- AOT- Construction Management System Replacement Budget Summary

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AOT SharePoint Modernization				
Agency/Department	Agency of Transportation (AOT)		**Current Project Phase**		Closing
Original Project Start Date	4/23/2024	**Original Project Estimated End Date**	7/31/2025	**Number of Change Orders Approved**	2
Actual Start Date	9/13/2024	**Current Estimated End Date**	7/31/2025		

Project	Status	Update
Scope	**ON TRACK**	The project was closed no major changes or amendments required.
Schedule	**ON TRACK**	The AOT SharePoint Modernization Project went live on the scheduled date of 5/1/25, and the project was closed on 6/24/25.
Budget	**ON TRACK**	The project was closed with an actual project cost of $200,000, below the budgeted cost of $214,960.
Overall	**ON TRACK**	

Scope Summary

The SharePoint Migration/Update project for the Agency of Transportation (AOT) represents a strategic initiative to overhaul and modernize the Agency's SharePoint data infrastructure. This project encompasses the design and implementation of a new intranet architecture and associated administrative processes, tailored to meet the evolving needs of AOT's diverse departments. With a focus on usability, compliance, employee education, and efficient document management, this project aims to transform the way AOT manages and interacts with its critical data.

Schedule Summary

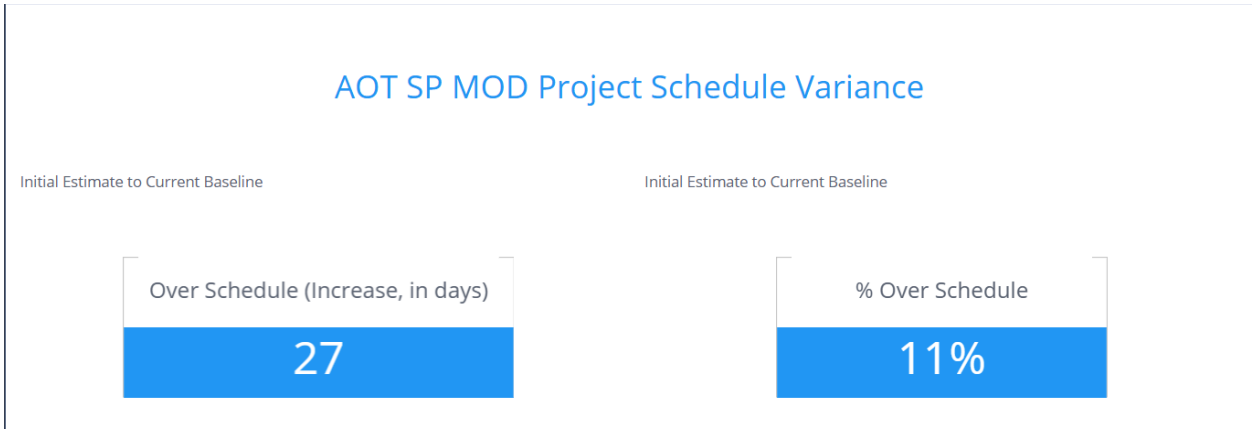
The AOT SharePoint Modernization Project went live on 5/1/25 and all support activities for the project have completed. The project is now CLOSED.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$214,960.00	$214,960.00	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
	0	**ON TRACK**

Total Original Estimated IT Activity Cost	Total Current Estimated State IT Activity Cost	Budget Status – Over or Under Budget
	$214,960.00	ON TRACK
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts



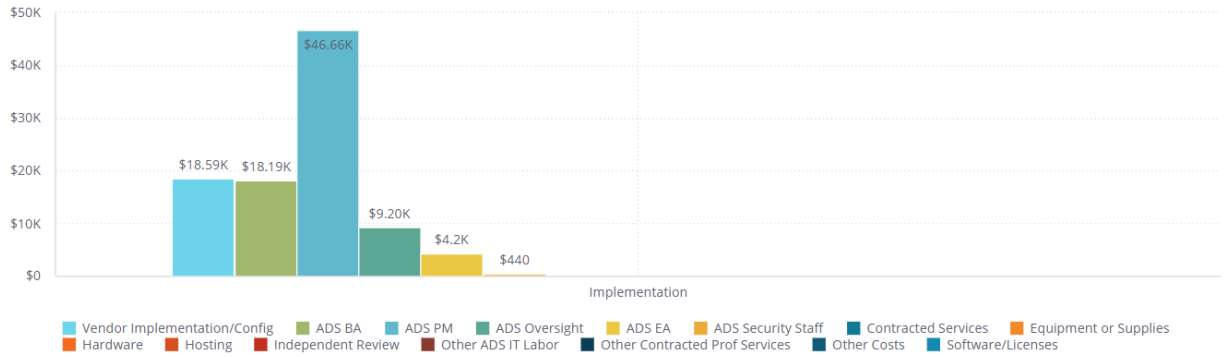
AOT SharePoint Modernization Project Budget Details

Actual Project Costs through December 2025

Budgeted vs Actual Invoiced Implementation Costs

Cost Category*	Cost Type*	Total Budget Cost	Total Invoiced Cost	Budget Remaining	% Budget Remaining
Implementation	ADS EPMO Project Manager for Implementation	$50,000.00	$53,020.00	$-3,020.00	-6.04%
	ADS EPMO Project Oversight & Reporting		$836.00	$-836.00	
	Other ADS IT Labor for Implementation	$20,000.00		$20,000.00	100.00%
	Vendor Implementation/Installation/Configuration	$144,960.00	$144,960.00	$0.00	0.00%
Grand Total		$214,960.00	$198,816.00	$16,144.00	7.51%

Actual Implementation Costs by Cost Type



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AOT Wrike Implementation				
Agency/Department	Agency of Transportation (AOT)		**Current Project Phase**		Closing
Original Project Start Date	12/2/2024	**Original Project Estimated End Date**	5/30/2025	**Number of Change Orders Approved**	0
Actual Start Date	10/29/2024	**Current Estimated End Date**	5/30/2025		

Project	Status	Update
Scope	**ON TRACK**	The project successfully closed with no changes to scope as defined in the IT ABC and Charter.
Schedule	**ON TRACK**	The project closed on schedule on the projected May 30, 2025 completion date.
Budget	**ON TRACK**	The project is budgeted to cost $866,880 over its 5-year lifecycle. $215,685 of the budgeted $215,685 in implementation costs was expended to complete the project.
Overall	**ON TRACK**	

Scope Summary

The objective of this project is to replace the current legacy construction project management platform, Artemis, used by the Agency of Transportation (AOT) Highway Division Project Delivery Bureau with a modern cloud-based platform. Artemis is a decades old, legacy on-prem solution with high licensing costs. Over the past two years, multiple unsuccessful attempts were made to solicit a solution to replace Artemis. When it was announced that the Agency of Digital Services (ADS) Enterprise Project Management Office (EPMO) implemented a solution (Wrike) to replace its Portfolio/Project Management solution, ADS assigned to AOT introduced Wrike to AOT to determine if it could meet the Agency's needs and possibly replace Artemis. During an evaluation by AOT Project Delivery Bureau Leadership and ADS it was determined that Wrike would meet AOT's needs and the project was officially launched. The scope of this project is to identify all Statement of Work (SOW) activities to procure Wrike licenses and system implementation professional services for AOT and ensure the successful implementation of the solution for all current users of Artemis.

Schedule Summary

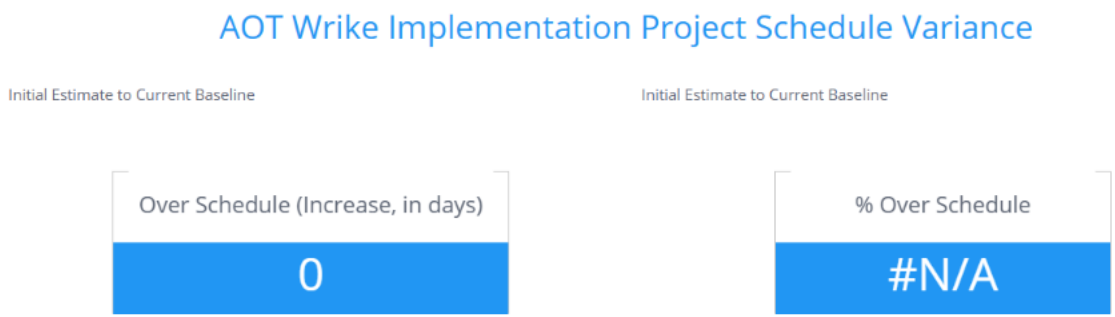
The project started on June 28, 2024 and complete on schedule on May 30, 2025. No changes occurred to the baseline overall schedule since project inception.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$296,480.00	$296,480.00	**ON TRACK**

Total Original Estimated Operating Cost	Total Current Estimated State Operating Cost	Budget Status – Over or Under Budget
$570,400.00	$570,400.00	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$866,880.00	$866,880.00	ON TRACK
Solution Lifecycle Years	5	

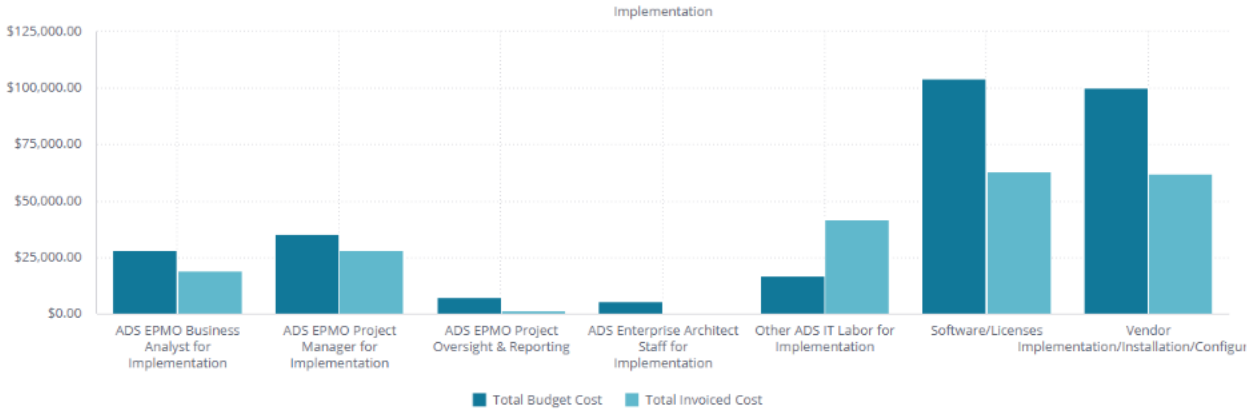
Schedule Variance and Budget to Actuals Charts



AOT- Wrike Implementation Budget Summary

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs



Department of Labor (DOL)

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	VDOL - Make IT Better				
Agency/Department	Other Department of Labor		**Current Project Phase**		Closing
Original Project Start Date	12/7/2023	**Original Project Estimated End Date**	3/25/2024	**Number of Change Orders Approved**	0
Actual Start Date	2/15/2024	**Current Estimated End Date**	3/25/2024		

Project	Status	Update
Scope	**ON TRACK**	This project was implemented within the originally identified scope. However, there were times in which additional scope was under consideration in order to better support the outcome of the initiative and the needs of our business partners. These items, outside of scope, were identified and documented for future consideration.
Schedule	**MANAGEABLE RISKS**	This project was not completed during it's originally anticipated timeline, due to various reasons, such as resource availability, under-estimating the level of work effort required and high level of unknowns at the start of the project.
Budget	**MANAGEABLE RISKS**	This project did not have an established ITABC form. However, the IT Service request was documented at $930,904.72. However, due to the need to extend the project through February 2025, in order to complete the effort, the actual costs billed through the most recent billing cycle of January 2025, were $1,159,231.20. Please note that this total is not reflective of any hours billed from 2/19/2025 – to present, as invoices for this period have not yet been released.
Overall	**MANAGEABLE RISKS**	

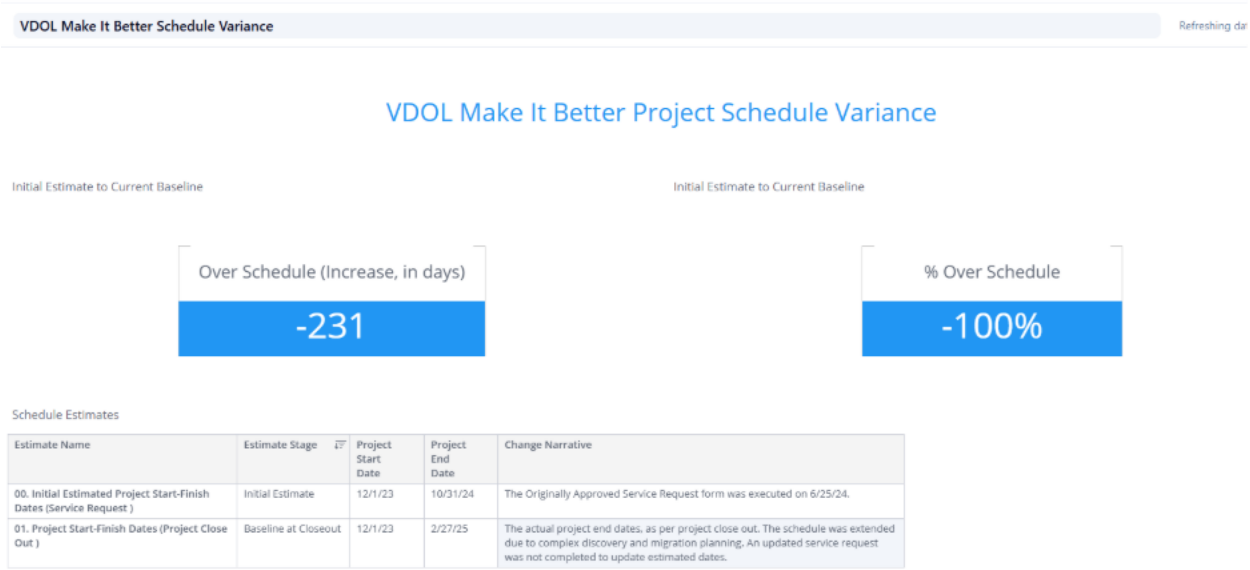
Scope Summary

The scope of this project was well defined but experienced intermittent instances of scope creep. This impacted the project schedule. Mitigation discussions resolved scope creep and the project work returned to its intended scope.

Schedule Summary

This project was not completed by it's originally anticipated deadline.		
Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$509,965.43	$952,140.00	**OVER BUDGET**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
	0	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
	$952,140.00	**OVER BUDGET**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts



Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
00. Initial Estimated Project Start-Finish Dates (Service Request)	Initial Estimate	12/1/23	10/31/24	The Originally Approved Service Request form was executed on 6/25/24.
01. Project Start-Finish Dates (Project Close Out)	Baseline at Closeout	12/1/23	2/27/25	The actual project end dates, as per project close out. The schedule was extended due to complex discovery and migration planning. An updated service request was not completed to update estimated dates.

VDOL Make It Better Budget Details

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs

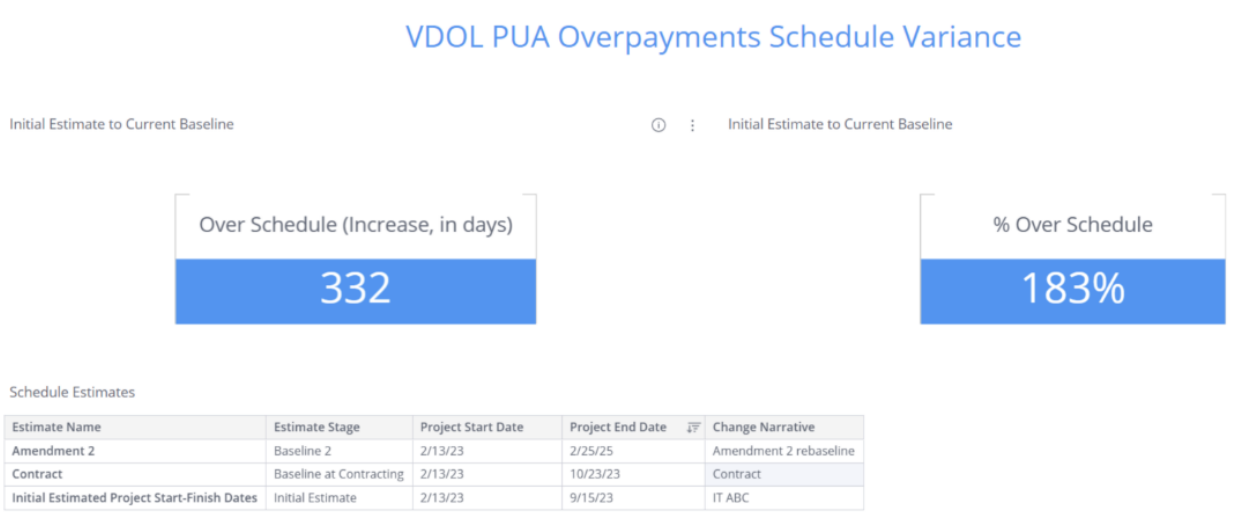
Cost Category*	Cost Type*	Total Budget Cost	Total Invoiced Cost	Budget Remaining	% Budget Remaining
Implementation	ADS Enterprise Architect Staff for Implementation	$2,153,049.14	$75,020.00	$2,078,029.14	96.52%
	ADS EPMO Business Analyst for Implementation	$175,333.72	$72,116.00	$103,217.72	58.87%
	ADS EPMO Project Manager for Implementation	$143,836.00	$61,930.00	$81,906.00	56.94%
	ADS EPMO Project Oversight & Reporting		$7,656.00	$-7,656.00	
	ADS Security staff for Implementation	$114,842.86	$4,752.00	$110,090.86	95.86%
	Other ADS IT Labor for Implementation	$1,237,080.00	$992,634.20	$244,445.80	19.76%
	Other Contracted Professional Services for Implementation	$120,000.00		$120,000.00	100.00%
Grand Total		$3,944,141.72	$1,214,108.20	$2,730,033.52	69.22%

Actual Implementation Costs by Cost Type

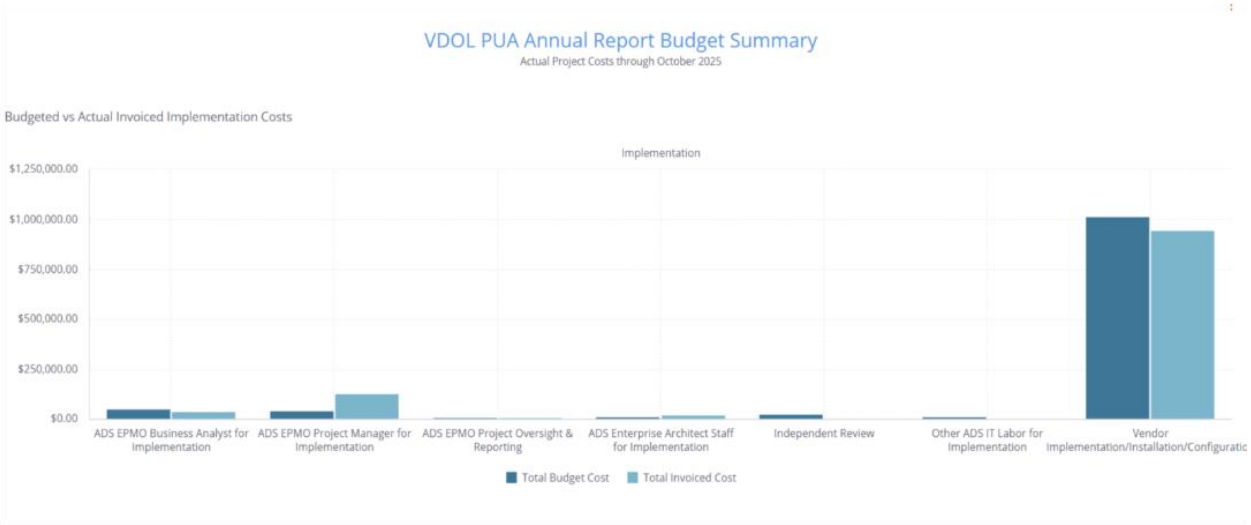
IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	VDOL - PUA Overpayments and Collections				
Agency/Department	Other Department of Labor		**Current Project Phase**		Execution
Original Project Start Date	2/15/2022	**Original Project Estimated End Date**	3/31/2025	**Number of Change Orders Approved**	2
Actual Start Date	6/26/2023	**Current Estimated End Date**	3/31/2025		
Project	**Status**		**Update**		
Scope	**ON TRACK**		The project scope has been trimmed significantly. Now that the statute of limitations has been reached for collection of overpayments and USDOL has approved VDOL applying a state statute to PUA paid claims, VDOL will not seek to collect from overpaid claimants. The PUA system will be utilized to notify claimants of overpayment status and that no action will be taken to recoup the funds. It will also be utilized to produce required federal reports, and pursue fraudulent claims.		
Schedule	**ON TRACK**		The project met the rebaselined schedule for go-live. The project remains open for EPMO support of post go-live activities. Some functionality was completed during the warranty period, such as finalized federal report functions and updated e-mail templates. More functionality is needed for federal reporting before project closure.		
Budget	**ON TRACK**		Current spend reflects $1,142,193 of the budgeted $1,188,743. The project is over the original estimate but in line with rebaselined budget.		
Overall	**ON TRACK**				
Scope Summary					
The project originally aimed to add functionality to the current Salesforce Pandemic Unemployment Assistance application (PUA) to determine and calculate PUA overpayments, communicate to claimants, and collect monies to reduce/eliminate overpayment balances. The project sought to satisfy requirements of the United States and Vermont Departments of Labor (USDOL and VDOL) to collect and/or recover monies that have been overpaid to PUA claimants. The scope was trimmed to not include collection/recovery of monies in line with USDOL guidance. Federal reporting is still required, and the functionality seeks to fulfill this reporting need and pursue fraudulent claims.					
Schedule Summary					

Originally the project was scheduled to be completed in September of 2023. It was rebaselined to complete in October 2024, with a warranty period until January 2025. Upon completion of warranty, the project has remained open to allow for EPMO support during a post-implementation phase supporting VDOL's federal reporting needs. The project is expected to close in 2025 at the completion of these post-implementation activities.		
Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$1,168,743.00	$1,168,743.00	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$20,000.00	$20,000.00	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$1,188,743.00	$1,188,743.00	**ON TRACK**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts



Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Amendment 2	Baseline 2	2/13/23	2/25/25	Amendment 2 rebaseline
Contract	Baseline at Contracting	2/13/23	10/23/23	Contract
Initial Estimated Project Start-Finish Dates	Initial Estimate	2/13/23	9/15/23	IT ABC


VDOL PUA Annual Report Budget Summary
Actual Project Costs through October 2025
Budgeted vs Actual Invoiced Implementation Costs
Implementation
$1,250,000.00
$1,000,000.00
$750,000.00
$500,000.00
$250,000.00
$0.00
ADS EPMO Business Analyst for Implementation
ADS EPMO Project Manager for Implementation
ADS EPMO Project Oversight & Reporting
ADS Enterprise Architect Staff for Implementation
Independent Review
Other ADS IT Labor for Implementation
Vendor Implementation/Installation/Configuratic
Total Budget Cost
Total Invoiced Cost

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	VDOL - Unemployment Insurance Modernization				
Agency/Department	Other Department of Labor		**Current Project Phase**		Execution
Original Project Start Date	7/1/2021	**Original Project Estimated End Date**	8/15/2026	**Number of Change Orders Approved**	1
Actual Start Date	9/17/2024	**Current Estimated End Date**	8/15/2026		

Project	Status	Update
Scope	**ON TRACK**	The project is the complete replacement of the existing Unemployment Insurance system including the front end of the claimant portal, employer portal, employer registration, and fraud reporting/case management. Scope has not been modified outside of agreements to push some items to post go-live, mutually agreed upon by VDOL and FAST.
Schedule	**ON TRACK**	The project is on track for go-live in May 2026. The team is working according to the revised schedule as that has been documented in a change request.
Budget	**ON TRACK**	An IT ABC update was recently completed in September 2025, with a total cost of $30,697,644.25. The project is tracking to be on budget, and $7.5m has been spent to date.
Overall	**ON TRACK**	

Scope Summary

The VDOL Unemployment Insurance Modernization Project is a transformative initiative that seeks to revamp the UI program in Vermont. By replacing aging, standalone mainframe-based systems, the project aims to improve customer service, reduce costs, meet compliance requirements, and mitigate risks associated with legacy infrastructure. The project consolidates the originally planned multi-phase effort into one comprehensive project. This consolidation allows for a more streamlined and efficient implementation, ensuring that the benefits of the modernized system can be realized sooner. The existing mainframe-based systems have become increasingly costly and difficult to support, particularly when it comes to implementing federally required UI changes. The modernized system will address these challenges by providing a more flexible and adaptable platform that can efficiently handle complex UI changes and compliance requirements. By implementing a modernized system, the VDOL aims to enhance customer service by improving the efficiency and accuracy of UI processes. Claimants will experience a more streamlined and user-friendly interface, making it easier to file claims, access information, and receive timely benefits. The modernized system will also reduce costs associated with maintaining and supporting legacy infrastructure. By moving away from the aging mainframe-based systems, the VDOL can leverage modern technologies and architectures that are more cost-effective and easier to maintain. Meeting federal and state compliance requirements is a critical aspect of the project. The modernized system will ensure that all necessary regulations and guidelines are met, reducing the risk of non-compliance and associated penalties. Furthermore, the project will mitigate risks caused by outages of legacy infrastructure. By transitioning to a modernized

system, the VDOL can improve system reliability and reduce the potential for disruptions in UI services. In conclusion, the VDOL Unemployment Insurance Modernization Project represents a significant step towards revamping the UI program in Vermont. By replacing aging, standalone mainframe-based systems with a modernized system, the project aims to enhance customer service, reduce costs, meet compliance requirements, and mitigate risks associated with legacy infrastructure. This initiative reflects the commitment of the VDOL to provide efficient and effective unemployment insurance services to the people of Vermont.

Schedule Summary

The project is in the execution phase with project kickoff held on September 17, 2024. A change request resulted in a shortened schedule when the decision to do a combined, rather than split, go-live was reached in December 2024. Go-live with the unemployment insurance system is set for May 2026.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$31,840,862.25	$30,663,324.52	UNDER BUDGET
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
	$12,667,000.00	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
	$43,330,324.52	ON TRACK
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

VDOL Unemployment Insurance Modernization Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

-83

Initial Estimate to Current Baseline

% Over Schedule

-7%

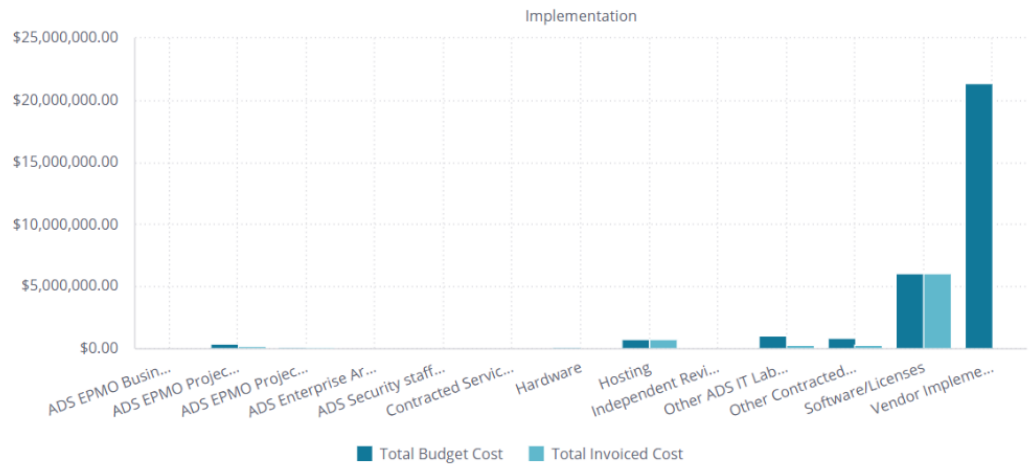
Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Contract	Baseline at Contracting	4/1/22	9/18/26	Executed Contract
Initial Estimated Project Start-Finish Dates	Initial Estimate	4/1/22	6/30/26	IT ABC Estimate
Change Request/Amendment 1	Baseline 2	4/1/22	5/26/26	Combined rollout CR trimmed 4 months

VDOL UI Annual Report Budget Summary

Actual Project Costs through October 2025

Budgeted vs Actual Invoiced Implementation Costs



Department of Public Safety (DPS)

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	DPS - Data Dashboard				
Agency/Department	Department of Public Safety (DPS)		**Current Project Phase**		Execution
Original Project Start Date	10/16/2023	**Original Project Estimated End Date**	5/16/2025	**Number of Change Orders Approved**	0
Actual Start Date	10/24/2024	**Current Estimated End Date**	5/16/2025		

Project	Status	Update
Scope	**ON TRACK**	All project scope identified in the executed SOW was implemented. The project met its original goals and requirements.
Schedule	**ON TRACK**	The project was successfully implemented on 4/8/25.
Budget	**ON TRACK**	The implementation budget established at contract execution was $997,698.00, with actual costs at closing equaling $969,599.00.
Overall	**ON TRACK**	

Scope Summary

The Vermont Department of Public Safety is dedicated to improving law enforcement data access across the state. The main goal is to create a secure and seamless system for accessing de-identified, aggregated law enforcement data. This data is currently stored in a robust record management system. In collaboration with the Vermont Agency of Digital Services (ADS), and vendor (Slalom) we are partnering with Amazon Web Services (AWS) to construct an advanced Public Services Lakehouse environment. This partnership will revolutionize how law enforcement agencies in Vermont analyze and utilize critical data. By leveraging the power of AWS, we will establish a secure, scalable, and sustainable platform that integrates various sources of law enforcement information. This platform will empower agencies to make data-driven decisions, enhance public safety efforts, and optimize resource allocation. This aligns with Governors Strategic Initiatives in increasing transparency with Vermont Department of Public Safety (DPS) activities.

Schedule Summary

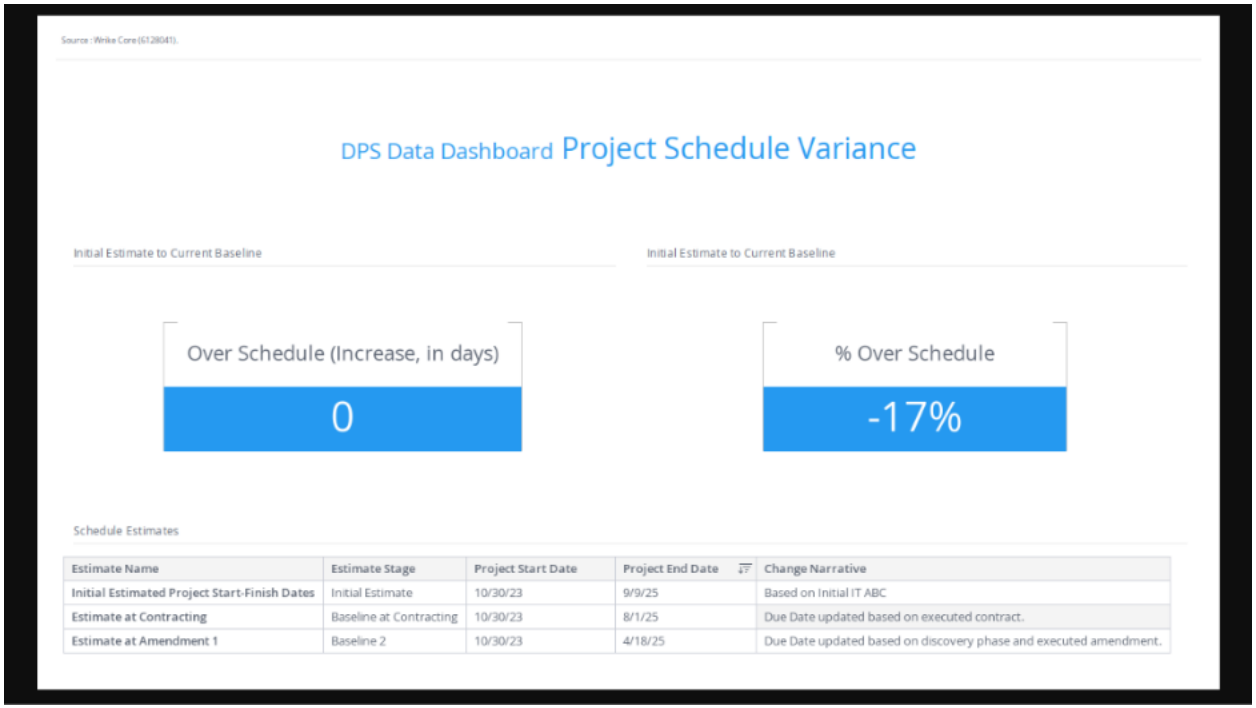
The project was successfully implemented on 4/8/2025.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$997,698.00	$969,599.00	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**

	0	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
	$969,599.00	**ON TRACK**
Solution Lifecycle Years	3	

Schedule Variance and Budget to Actuals Charts



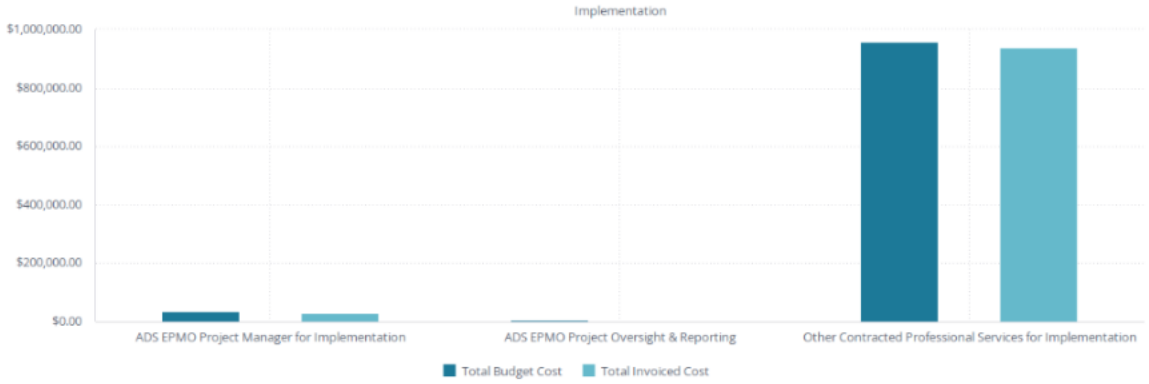
Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Initial Estimated Project Start-Finish Dates	Initial Estimate	10/30/23	9/9/25	Based on Initial IT ABC
Estimate at Contracting	Baseline at Contracting	10/30/23	8/1/25	Due Date updated based on executed contract.
Estimate at Amendment 1	Baseline 2	10/30/23	4/18/25	Due Date updated based on discovery phase and executed amendment.

Source : Wrike Core (6128041).

DPS Data Dashboard Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	DPS - FS - Fire Safety Records Management System Replacement				
Agency/Department	Department of Public Safety (DPS)		**Current Project Phase**		Execution
Original Project Start Date	3/1/2022	**Original Project Estimated End Date**	6/21/2026	**Number of Change Orders Approved**	0
Actual Start Date	2/16/2025	**Current Estimated End Date**	6/21/2026		

Project	Status	Update
Scope	**ON TRACK**	The project will replace the current records management workflow and database with a flexible, modern platform that reduces manual processes, improves public accessibility and security and allows for budgeted costs. Some of the workflow modules included in the upgrade are Plan Review, Inspection and Enforcement.
Schedule	**ON TRACK**	The project was initially expected to be completed by July 2023. However, due to an extended procurement phase that involved multiple reposting of the RFP, the estimated completion date was revised to December 2025. An independent review was completed in October 2024, and the vendor contract was signed in December 2024. The project is now anticipated to be finished by August 2026.
Budget	**NEEDS LEADERSHIP INTERVENTION**	The initial project cost estimate was baselined during exploration at $2.232.766. The project cost has been rebasedlined to $3,182,073 after the revised project estimate was approved. ADS labor time was added for to ensure vendor performance and application quality remained high. The current project actual cost for October 2025 is $439,615. Should the project schedule, scope or cost change as the project progresses the budget will be updated to reflect the changes.
Overall	**MANAGEABLE RISK**	

Scope Summary

The DPS Fire Safety Records Management System Replacement project is a groundbreaking effort to update and enhance the management of fire safety records in Vermont. This initiative aims to replace the outdated proprietary software that has been in use since 1985, which has become costly and challenging to upgrade. The current system lacks essential modern features such as digital document management, an online portal, payment processing, and continuing education management, which have limited the department's service efficiency and ability to meet stakeholder needs.

The new system will be developed on a modern and adaptable platform, allowing Fire Safety to minimize manual tasks, enhance public access and security, and stay within budget. With digital document management, records will be easily searchable and accessible, eliminating the need for physical storage and reducing the risk of document loss or damage. The introduction of an online portal will offer Fire Safety partners and customers a convenient and user-friendly way to access and manage their records, including the ability to make secure online payments. Additionally, the system will support continuing education management, helping fire safety professionals track and maintain their certifications.
By replacing the outdated system, the DPS Fire Safety division is dedicated to improving efficiency, accessibility, and security. The new platform will provide stakeholders with modern tools and features to effectively manage fire safety records and comply with regulatory requirements. This project is a crucial step in modernizing fire safety records management in Vermont, demonstrating a commitment to delivering efficient and effective services to the community.

Schedule Summary

This project procurement process was delayed due to repeated postings of the Request for Proposal (RFP) because of low vendor response rates and issues with the vendor response bids. Initial bidder selection activity commenced in August 2023, and a preferred vendor was identified. After the vendor was chosen, a vendor implementation contract was executed in December 2024. The implementation is expected to be completed by August 2026.

Budget Summary

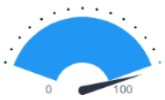
Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$1,436,190.00	$1,514,522.00	OVER BUDGET
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$1,676,485.00	$1,676,485.00	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$3,112,675.00	$3,191,007.00	OVER BUDGET
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

DPS - Fire Safety Records Management System Replacement - Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)



270

Initial Estimate to Current Baseline

% Over Schedule

31%

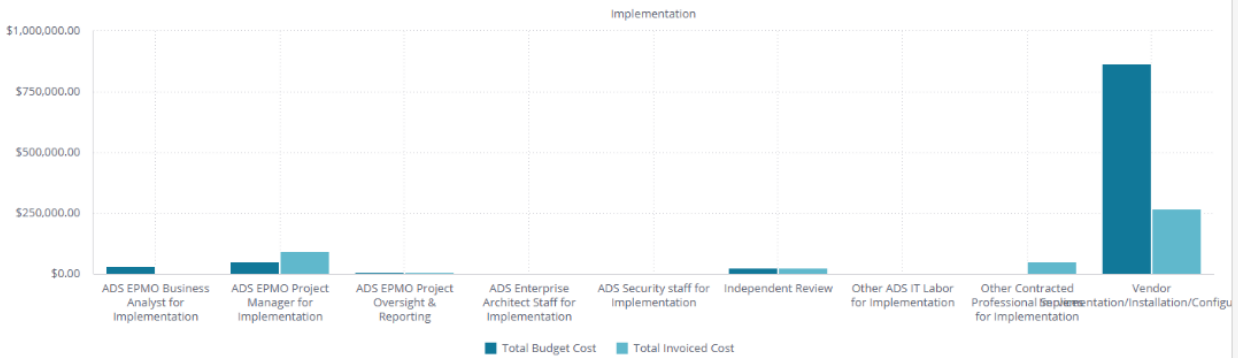
Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Baseline 2	Baseline 2	1/3/22	7/1/26	IT ABC Form Approved 3.13.2025
05. Planning Estimate of Project Start-Finish Dates	N\A	1/3/22	4/28/26	******Change Request 10.9.25. Change Request and Contract Amendment are currently b
03. Baseline at Contracting of Project Start-Finish Dates	Baseline at Contracting	1/3/22	6/2/25	IT ABC Form Approved 10.14.24
04. Planning Estimate of Project Start-Finish Dates	Planning Estimate	1/3/22	6/2/25	IT ABC Form Approved 6.25.24
02. (A)Planning Estimate of Project Start-Finish Dates	Planning Estimate	1/3/22	9/11/23	CR01 Schedule Rebaseline 9.11.23
00. Initial Estimate of Project Start-Finish Dates	Initial Estimate	1/3/22	7/3/23	IT ABC Form Approved 3.11.22
01. Initial Estimate of Project Start-Finish Dates	Initial Estimate	1/3/22	7/3/23	IT ABC Form Approved 3.24.22
02. Planning Estimate of Project Start-Finish Dates	Planning Estimate	1/3/22	7/3/23	IT ABC Form Approved 9.15.22

DPS - Fire Safety Records Management System Replacement - Annual Report Budget Summary

Actual Project Costs through December 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	DPS - VFL LIIMS				
Agency/Department	Department of Public Safety (DPS)		**Current Project Phase**		Execution
Original Project Start Date	10/3/2022	**Original Project Estimated End Date**	12/31/2025	**Number of Change Orders Approved**	1
Actual Start Date	11/1/2023	**Current Estimated End Date**	12/31/2025		
Project	**Status**		**Update**		
Scope	**ON TRACK**		The scope of the project was defined in the contract and aims to replicate all existing forensic data storage and reporting that is in the current on-premises system with a cloud-based system. A change request was executed to delay partial payment of the final implementation milestone until all security issues have been remediated and re=tested to the satisfaction of the State.		
Schedule	**ON TRACK**		The initial IT ABC signed on 9/30/2022 defined the project schedule as starting on 10/1/2022 and ending on 12/30/2022. Issues with contract negotiations relating to changes in State standard Terms and Conditions from an existing contract between the selected vendor and the state caused extensive delays. As a result, the IT ABC was updated with completion scheduled to 4/30/2024. The contract was executed on 11/2/2023 with implementation starting shortly thereafter. Issues in implementation of legacy reports and delays in getting vendor staff access to systems required the completion date to be revised to Dec 30, 2024. Vulnerabilities identified during penetration (security) testing and required patching have extended the project completion to Dec 30, 2025.		
Budget	**ON TRACK**		The original project budget during exploration was expected to be $351,000 based on assumed costs for the solution and rapid implementation. The lifecycle cost was revised to $721,740.65 in October of 2023 to account for increases in State costs due to delays in contract execution as well as revised licensing and implementation costs finalized during contract negotiation and execution. In March of 2025, the budget was reconciled with costs to date and to address a Change order to modify payment milestones resulting in a current total lifecycle cost estimate of		

		$628,648.67. Currently project costs incurred are $293,473.00 and are within the overall approved budget.
Overall	**ON TRACK**	

Scope Summary

The Vermont Forensic lab (VFL) is the only forensic laboratory in the State of Vermont and provides services to the entire criminal justice system. The VFL uses an older on-premise Laboratory Information Management System (LIMS) from Caliber, Inc called Forensic Advantage. The use of LIMS is a requirement for VFL to maintain is accreditation and is used to record all forensic data associated with cases that are handled at VFL. The scope of this project is to upgrade the current on-premise LIMS with a cloud-based solution from Caliber (the current vendor). A cloud based solution offers greater continuity in the event of a disaster and aligns with ADS's Cloud first strategy.

Schedule Summary

Penetration (security) testing revealed vulnerabilities that required patching by the vendor, extending the project completion from the original projected Dec 30, 2024 date to Dec 30, 2025.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$164,092.00	$171,000.00	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$457,648.65	$457,648.67	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$621,740.65	$628,648.67	**ON TRACK**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

DPS VFL LIMS Replacement Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

416

Initial Estimate to Current Baseline

% Over Schedule

103%

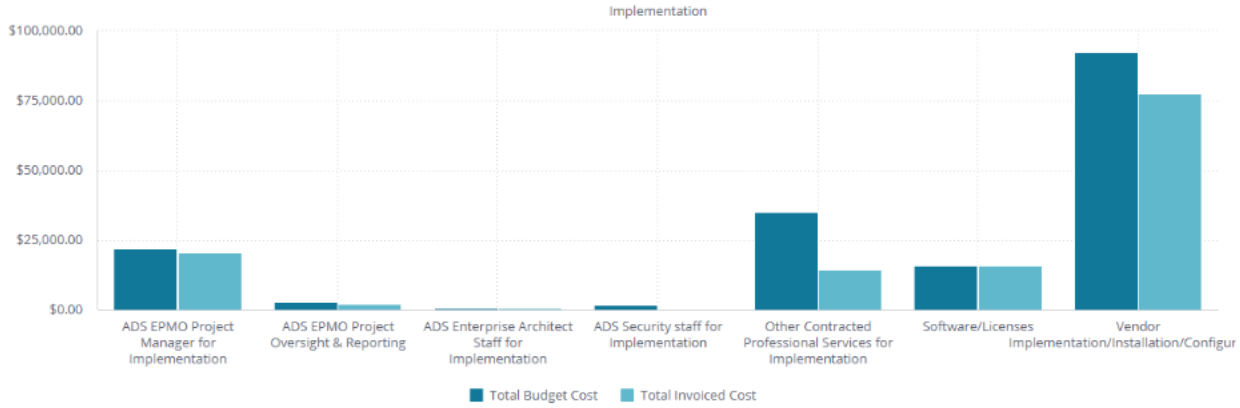
Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
CO 001 Extension of Time Estimated Project Completion	Baseline 2	10/3/22	12/31/25	Version 3 of the project IT ABC accounted for delays resulting from solution updates required in order to address security vulnerabilities identified during penetration testing in the fall of 2024 and was signed June 7, 2025.
Baseline @ Contracting Estimated Project Start-Finish Dates	Baseline at Contracting	10/3/22	4/30/24	The schedule defined at contract execution accounted for extensive contract negotiations and was based on the contractor's schedule.
Initial Estimated Project Start-Finish Dates	Initial Estimate	10/3/22	12/30/22	The original IT ABC signed Sept 30, 2022 expected a short-duration implementation and upgrade with the current vendor.

DPS VFL LIMS Budget Summary

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs



Secretary of State (SOS)

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	SOS Business Filing System				
Agency/Department	Other Secretary of State		**Current Project Phase**		Closing
Original Project Start Date	1/31/2025	**Original Project Estimated End Date**	1/31/2025	**Number of Change Orders Approved**	1
Actual Start Date	2/12/2024	**Current Estimated End Date**	1/31/2025		

Project	Status	Update
Scope	**ON TRACK**	The baseline scope includes full replacement of the VT Secretary of State's business services platform including uniform commercial code, and temporary officiant processing. There is one change request to utilize the vendor's Azure Cloud for document management instead of the State's OnBase instance.
Schedule	**ON TRACK**	The project implementation started 12/11/25 and was successfully launched on 12/15/2024. The original baseline go-live was 12/13/2024.
Budget	**ON TRACK**	The baseline budget for implementation at contract was established at $3,483,272.33. The actual cost to implement was $3,090,760.00. Due to a change request, which impacted annual maintenance costs, the contract increased 4.83% from $4,790,303.76 to $5,021,503.76.
Overall	**ON TRACK**	

Scope Summary

The SOS Business Filing System Project is a transformative initiative that seeks to modernize and streamline business services provided by the Vermont Secretary of State's Office. By replacing the existing Business Services Platform, the project aims to enhance efficiency, accessibility, and security in managing various applications, including UCC filings. The scope of the project includes the implementation of a comprehensive suite of services applications, including document management and electronic filing systems. These applications will enable businesses and individuals to easily submit and manage their filings online, reducing the need for manual paperwork and streamlining the overall process. Software modernization is a key component of the project, ensuring that the new system is built on the latest technology and can accommodate future enhancements and updates. This modernization effort will improve system performance, reliability, and scalability, providing a robust foundation for business services. Incorporating cyber security compliances is a top priority for the SOS Business Filing System Project. The new system will adhere to industry best practices and regulatory requirements to ensure the protection of sensitive business information and personal data. By implementing robust security measures, the project aims to safeguard the integrity and confidentiality of business filings and maintain public trust. The SOS Business Filing System Project represents a commitment to providing businesses and individuals with a user-friendly and efficient platform for managing their filings. The new system will enhance accessibility, allowing users to easily search, retrieve, and track their documents. It will also provide real-time updates and notifications, ensuring timely and accurate information for all stakeholders. The SOS Business Filing System Project is a significant step towards

modernizing and improving business services provided by the Vermont Secretary of State's Office. By replacing the existing Business Services Platform with a modernized system that incorporates document management, electronic filing systems, software modernization, and cyber security compliance, the 121 project aims to enhance efficiency, accessibility, and security. This initiative represents the commitment of the office to support businesses and individuals in their filing processes and contribute to a thriving business environment in Vermont.
Schedule Summary
The project was successfully implemented on 12/15/24.

Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$3,508,272.33	$3,090,408.33	**UNDER BUDGET**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$1,780,931.00	$2,012,131.00	**OVER BUDGET**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$5,289,203.33	$5,102,539.33	**UNDER BUDGET**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

Source : Wrike Core (6128041).

SOS Business Filing Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

0

Initial Estimate to Current Baseline

% Over Schedule

38%

Schedule Estimates

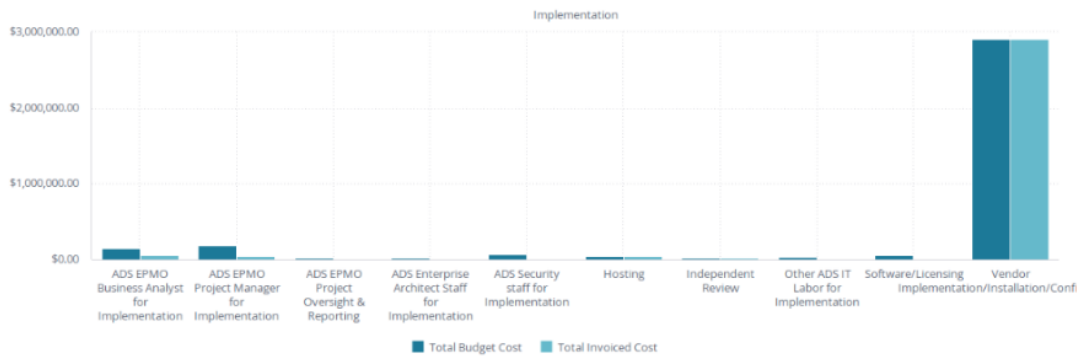
Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Baseline at Contracting Project Start-Finish Dates	Baseline at Contracting	3/1/23	1/31/25	Schedule dates and costs changed due to executed contract.
Initial Estimated Project Start-Finish Dates	Initial Estimate	2/8/23	6/28/24	Initial IT ABC

Source : Wrike Core (6128041).

SOS Business Filing Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	SOS - Elections System Replacement				
Agency/Department	Other Secretary of State		**Current Project Phase**		Execution
Original Project Start Date	10/10/2022	**Original Project Estimated End Date**	6/6/2025	**Number of Change Orders Approved**	0
Actual Start Date	9/5/2023	**Current Estimated End Date**	6/6/2025		

Project	Status	Update
Scope	**ON TRACK**	There were no significant changes to the scope of the project during its duration.
Schedule	**ON TRACK**	The schedule was re-baselined to reflect a change in go-live from February 2025 to May 2025 and it finished according to the re-baselined schedule. The delay in the project was due to additional training needs, SOS staff availability, and some critical bugs found during go-live. There were no implementation cost impacts to the 3-month pushback of go-live from February 2025 to May 2025.
Budget	**ON TRACK**	No charges are currently being made against this project and will not during project closeout. $3,851,670 was spent out of an implementation budget of $3,416,004
Overall	**ON TRACK**	

Scope Summary

The SOS Elections System Replacement Project is a transformative initiative that seeks to modernize and streamline election management processes in Vermont. By replacing the current election management system, the project aims to enhance efficiency, transparency, and accessibility in managing elections, campaign finance, and lobbying activities. The project scope includes a full replacement of the existing election management system, ensuring that the new system is equipped with robust features and capabilities. This comprehensive approach will enable the Secretary of State's Office to effectively manage all aspects of elections, including voter registration, ballot management, candidate filing, and result reporting. The SOS Elections System Replacement Project is driven by the goal of enhancing efficiency and accessibility for both election officials and the public. The new system will provide user-friendly interfaces and streamlined workflows, making it easier for election officials to manage elections and for candidates to navigate the campaign finance and lobbying processes. This initiative reflects the 123 commitment of the Secretary of State's Office to uphold the integrity of elections.

Schedule Summary

The implementation for the main election system replacement is complete. The system was initially expected to go live in February 2025, but was pushed to May 2025 to allow time for training and bux fixes. Project is currently in closeout, awaiting lessons learned response from SOS.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$4,734,232.00	$4,734,232.00	ON TRACK
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$2,835,700.00	$2,835,700.00	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$7,569,932.00	$7,569,932.00	ON TRACK
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

SOS Elections Management System Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

10

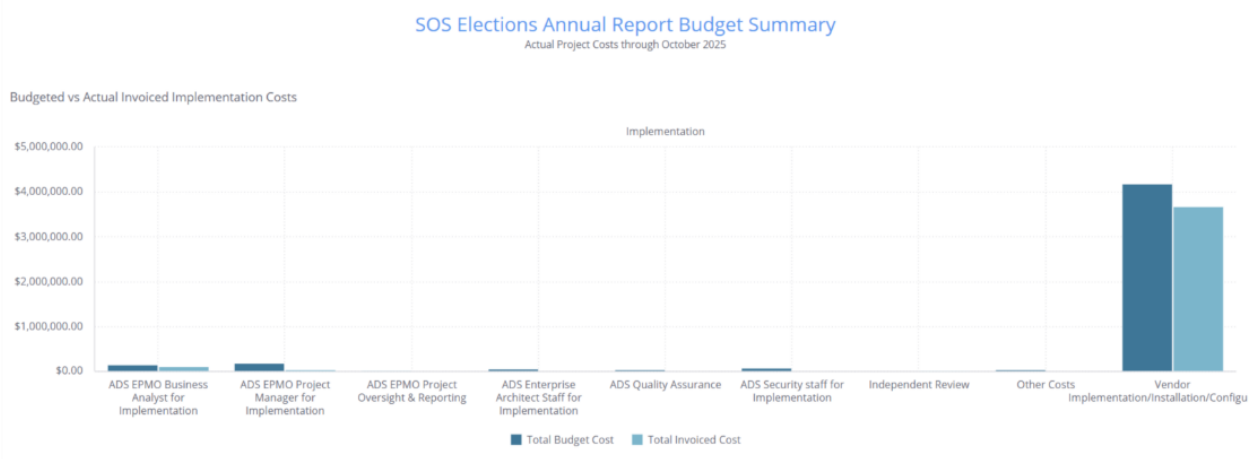
Initial Estimate to Current Baseline

% Over Schedule

2%

Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
UAT 3 Extension Estimate	Baseline 2	10/10/22	5/5/25	2 weeks for UAT 3/Training
Contract Execution Estimate	Baseline at Contracting	10/10/22	4/21/25	Contract baseline
Initial Estimated Project Start-Finish Dates	Initial Estimate	10/10/22	4/30/24	Initial ABC


SOS Elections Annual Report Budget Summary
Actual Project Costs through October 2025
Budgeted vs Actual Invoiced Implementation Costs
Implementation
$5,000,000.00
$4,000,000.00
$3,000,000.00
$2,000,000.00
$1,000,000.00
$0.00
ADS EPMO Business Analyst for Implementation
ADS EPMO Project Manager for Implementation
ADS EPMO Project Oversight & Reporting
ADS Enterprise Architect Staff for Implementation
ADS Quality Assurance
ADS Security staff for Implementation
Independent Review
Other Costs
Vendor Implementation/Installation/Configu
Total Budget Cost
Total Invoiced Cost

Other Executive Branch Projects

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	AGO - Case Management System Project				
Agency/Department	Other Attorney General's Office		**Current Project Phase**		Execution
Original Project Start Date	7/1/2022	**Original Project Estimated End Date**	11/30/2027	**Number of Change Orders Approved**	**0**
Actual Start Date	9/26/2025	**Current Estimated End Date**	11/30/2027		
Project	**Status**		**Update**		
Scope	**MANAGEABLE RISK**		The baseline scope of this project involves setting up a case management system specifically designed for handling both prosecutor and civil cases. Overall, this system aims to streamline case management, enhance security, and improve efficiency in handling legal cases		
Schedule	**ON TRACK**		The contract with the vendor was finalized on August 18, 2025. The implementation is scheduled to be 27 months.		
Budget	**ON TRACK**		The total implementation costs, which include expenses outlined in the vendor contract as well as all other associated implementation costs, such as state staff, are estimated to be $1,908,662.00		
Overall	**ON TRACK**				

Scope Summary

The AGO Case Management System project is a significant initiative aimed at enhancing legal case management within the Attorney General's Office. By implementing a new case management system, we aim to improve user experiences, increase productivity, and enhance information sharing, tracking, and reporting capabilities across the AGO. The new case management system will be utilized by all divisions and units within the AGO, providing a centralized platform for managing legal cases. This includes staff associated with 14 client agencies/departments, Diversion and Pre-Trial Services providers, and Consumer Assistance Program staff at the University of Vermont. By utilizing a single system, we can streamline processes, improve collaboration, and enhance the overall efficiency of case management within the AGO. The project's objectives include improving user experiences, ensuring that the system is intuitive, user-friendly, and tailored to the specific needs of AGO staff. This will enhance productivity and reduce the learning curve associated with adopting a new system. By providing a seamless and efficient user experience, we can maximize the benefits of the case management system. Furthermore, the new system will enhance information sharing, tracking, and reporting capabilities. It will enable AGO staff to easily access and share case-related information, improving collaboration and communication among different units and divisions. The system will also provide robust tracking and reporting functionalities, allowing for comprehensive analysis and reporting on case outcomes and performance. The AGO Case Management System project represents our commitment to leveraging technology to enhance legal case management within the Attorney General's Office. By implementing a new system, we aim to improve productivity, streamline processes, and enhance information sharing and reporting capabilities. Ultimately, this project will contribute to improved outcomes and more efficient. We remain dedicated to the successful implementation of the AGO Case Management System, ensuring that the system meets the specific needs of AGO staff

and supports their mission to provide effective legal services to the State of Vermont. Through this project, we are advancing case management practices and supporting the AGO in their pursuit of justice and positive outcomes. operations within the AGO.
Schedule Summary
The implementation schedule is organized into five divisions: 1) Criminal, 2) Administrative & Civil, 3) Environmental and Public Protection, 4) Health and Human Services Agency, and 5) General Counsel and Administrative Law. The State and the vendor will collaborate to establish the sequence in which these divisions will be implemented. The entire process, from initiation to completion, including the transition to ongoing support and maintenance, is expected to span 27 months.

Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$1,908,662	$1,908,662	ON TRACK
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$1,675,000	$1,675,000	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$3,583,662	$3,583,662	ON TRACK
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals charts

AGO CMS Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

0

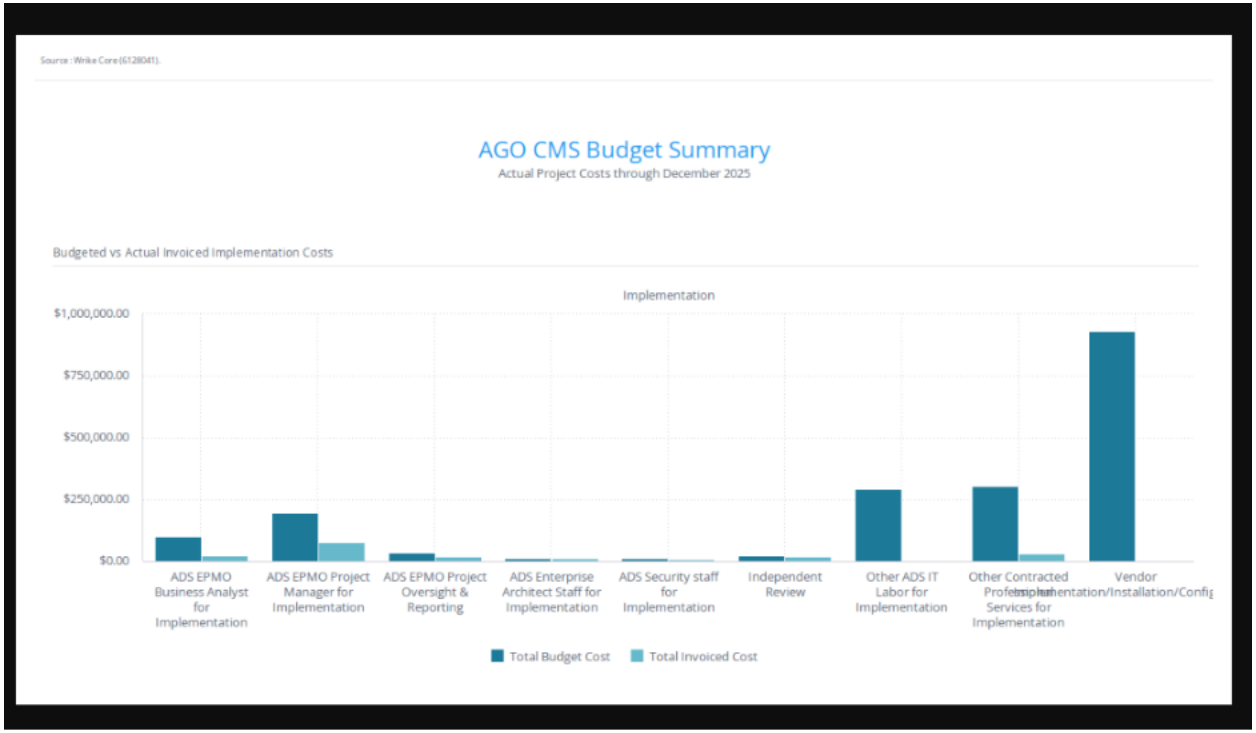
Initial Estimate to Current Baseline

% Over Schedule

0%

Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Based on the executed contract with Vendor, Project Start-Finish Dates	Baseline at Contracting	7/1/22	11/30/27	Schedule rebaselined based on executed contrac
Planning based on Selected Vendor Project Start-Finish Dates copy	Planning Estimate	7/1/22	11/30/26	Procurement took longer than estimated. New es
Initial Estimated Project Start-Finish Dates	Initial Estimate	7/1/22	2/27/26	Based on initial IT ABC form



IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	DLL - Business 2 Business eCommerce Website				
Agency/Department	Department of Liquor and Lottery		**Current Project Phase**		Execution
Original Project Start Date	4/1/2022	**Original Project Estimated End Date**	6/30/2026	**Number of Change Orders Approved**	0
Actual Start Date	5/5/2025	**Current Estimated End Date**	6/30/2026		
Project	**Status**		**Update**		
Scope	**ON TRACK**		Scope was established in the form of user stories and acceptance criteria and have been approved by the business and outline in the executed contract. In order to complete the scope for the eCommerce solution, the department's existing D365 inventory system needs extensive updates.		

Schedule	**ON TRACK**	The schedule has been outlined through execution and to reflect the post-implementation support period through April 1, 2026, with a pilot go-live date of 9/30 and a solution go live date of October 28, 2025.
Budget	**ON TRACK**	The updated IT ABC for implementation costs from the selected vendor and state implementation costs of $540,097.00. A Contract Amendment was executed to reflect a $725,500.00 cost increase.
Overall	**ON TRACK**	

Scope Summary

The Liquor Division's B2B eCommerce website is set to revolutionize the way DLL licensed establishments conduct their purchases from the 802Spirit stores. By providing a centralized and searchable portal, the division aims to enhance cost efficiency and streamline the ordering process. Licensees will now have the convenience of placing orders online, eliminating the need for manual paperwork and reducing administrative burdens. The online ordering capabilities will enable licensees to browse through a comprehensive catalog of spirits, select the desired products, and place orders with just a few clicks. This efficient process will save time and resources, allowing licensees to focus on serving their customers. The inventory search feature, coupled with a store locator, will empower Licensed Establishments (Restaurants, bars, etc.) to easily find the products they need. They can search for specific spirits, check availability, and locate nearby stores that carry the desired items. Consumers will not be using the eCommerce website, only the licensed establishments (Restaurants, Bars, etc.) This feature ensures that licensed establishments can quickly restock their inventory and meet customer demands without any hassle. In cases where a particular product is out of stock, the B2B eCommerce website will provide comparable items as alternatives. This feature allows licensed establishments to offer similar products to their customers. For example, if a licensed establishment cannot find the brand of liquor they typically utilize, the solution will offer them a similar alternative. Scheduled pick-up times will further enhance the convenience for licensees. They will have the flexibility to choose a time slot that suits their operational needs, ensuring a smooth and efficient pick-up process. Lastly, the ability to make online payments adds another layer of convenience and efficiency. Licensees can securely complete transactions online, eliminating the need for manual payment processing and reducing the risk of errors. The Liquor Divisions B2B eCommerce website isa game-changer for the DLL licensees, but providing a searchable portal with online ordering capabilities, inventory searches, comparable items, scheduled pick-up times, and online payment options. The division is committed to improving cost efficiency and streamlining spirit sales for licensees. This initiative will not only benefit licensees but also contribute to the overall growth and success of the liquor industry in Vermont.

Schedule Summary

The overall project schedule was mutually agreed upon between Provi and Accenture to align within Accenture's 16-week implementation plan. The project is currently in the Execution Phase, and completed the Pilot Go-Live on 9/30. The project team is supporting the pilot go-live and fixing the few issues that have been identified so far. The next milestone will be the general go-live, taking place at the end of October, after which the project team will focus on go-live support and implementation of the remaining aspects of the project. The project team is anticipating the end of the execution phase in early 2026.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget
$3,100,097.00	$3,772,459.13	**ON TRACK**

Total Original Estimated Operating Cost	Total Current Estimated State Operating Cost	Budget Status – Over or Under Budget
$709,200.00	$709,200.00	ON TRACK
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$3,809,297.00	$4,481,659.13	ON TRACK
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actual Charts

DLL eCommerce Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

269

Initial Estimate to Current Baseline

% Over Schedule

33%

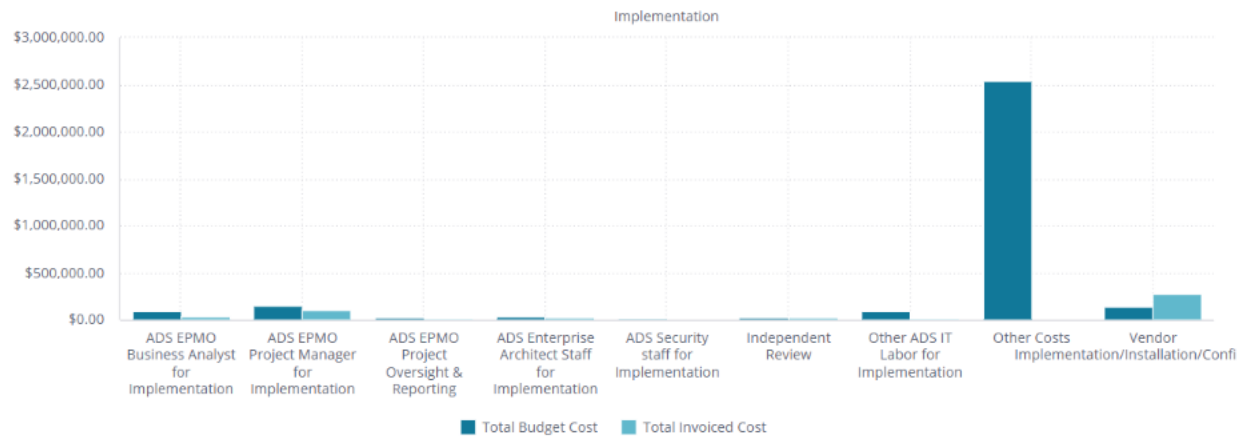
Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Baseline 3 Change Request	Baseline 3	4/1/22	6/30/26	Change Request from November 2025. Changes the end date
Baseline 2 (Updated IT ABC)	Baseline 2	4/1/22	10/1/25	Updated IT ABC Form. The Schedule is on track but needs a ch
Baseline at Contracting	Baseline at Contracting	4/1/22	6/2/25	IT ABC Form at Contracting
Initial Estimated Project Start-Finish Dates	Initial Estimate	4/1/22	1/2/24	Initial IT ABC Estimate

DLL eCommerce Connectivity Budget Summary

Actual Project Costs through October 2025

Budgeted vs Actual Invoiced Implementation Costs



Project Name	LURB - Act 250 Scanning				
Agency/Department	Other Natural Resources Board		Current Project Phase		Execution
Original Project Start Date	7/1/2021	Original Project Estimated End Date	6/30/2026	Number of Change Orders Approved	0
Actual Start Date	10/23/2023	Current Estimated End Date	6/30/2026		

Project	Status	Update
Scope	ON TRACK	The baseline scope includes scanning St. Johnsbury and Essex, VT facilities paper legacy permit folder files and making those newly digitized files accessible to public and staff online. The contact with the scanning vendor is structured as a not to exceed amount, allowing the NRB to scan the maximum amount of files for the appropriated project budget. It is unclear at this time if all files will be able to be scanned for the total budget amount of $500,000, which includes other costs in addition to the scanning vendor.
Schedule	ON TRACK	The contract was executed on 10/17/2023. There are no known schedule issues at this time. Due to ARPA funding the money must be expended by June 2026.
Budget	ON TRACK	The baseline budget was established at $500,000, actual cost to date equal $226,230.45, which indicate we are on track. The budget continues to be monitored. This project will utilize ARPA funding ($500,000) which was authorized by the legislature. ARPA Funds must be obligated by end of 2024 and expend by end of June 2026.
Overall	ON TRACK	

Scope Summary

The Natural Resources Board (NRB) Act 250 Scanning Project is a vital endeavor that seeks to digitize and preserve decades' worth of land use permit documents in Vermont. By converting physical records into digital format, the project aims to improve accessibility, streamline information retrieval, and ensure the long-term preservation of these valuable resources. The project scope encompasses the digitization of all NRB land use permit documents from 1970 to 2017, specifically from the St. Johnsbury and Essex facilities. This comprehensive approach ensures that a significant portion of Vermont's land use history is captured and made accessible to the public. Once digitized, these documents will be stored in a secure and organized manner, allowing for easy retrieval through the public Act 250 database website. This digital platform will provide the public with convenient access to historical land use permit records, fostering transparency and supporting informed decision-making. The benefits of the Act 250 Scanning Project extend beyond improved accessibility. By digitizing these records, the NRB can reduce reliance on physical storage, saving valuable space and resources. Additionally, the digital format enhances the preservation of these documents, safeguarding them from potential damage or loss due to physical deterioration. The Act 250 Scanning Project aligns with the NRB's commitment to efficient and transparent land use management. By making

these records easily accessible to the public, the project promotes public engagement and participation in the decision-making process. It also supports the NRB's mission to protect and sustain Vermont's natural resources for future generations. The NRB Act 250 Scanning Project is a significant step towards preserving Vermont's land use history and enhancing public access to valuable records. By digitizing all NRB land use permit documents from 1970 to 2017 and making them retrievable 135 through the public Act 250 database website, the project ensures transparency, efficiency, and the long-term preservation of these important resources.
Schedule Summary
This digitization effort is divided into the three major stages: Stage 1: State prepares paper documents and boxes and engages in custody transfer. Stage 2: Vendor engages in digitization, digital file upload, box transport, and custody transfer, which includes Proof of Concept with two boxes of materials. Stage 3: State engages in post-scanning processes.

Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$443,000.00	$443,000.00	**ON TRACK**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$57,000.00	$57,000.00	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$500,000.00	$500,000.00	**ON TRACK**
Solution Lifecycle Years	3	

Schedule Variance and Budget to Actuals Charts

Source : Wrike Core (6128041).

LURB Act 250Scanning Project Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

0

Initial Estimate to Current Baseline

% Over Schedule

0%

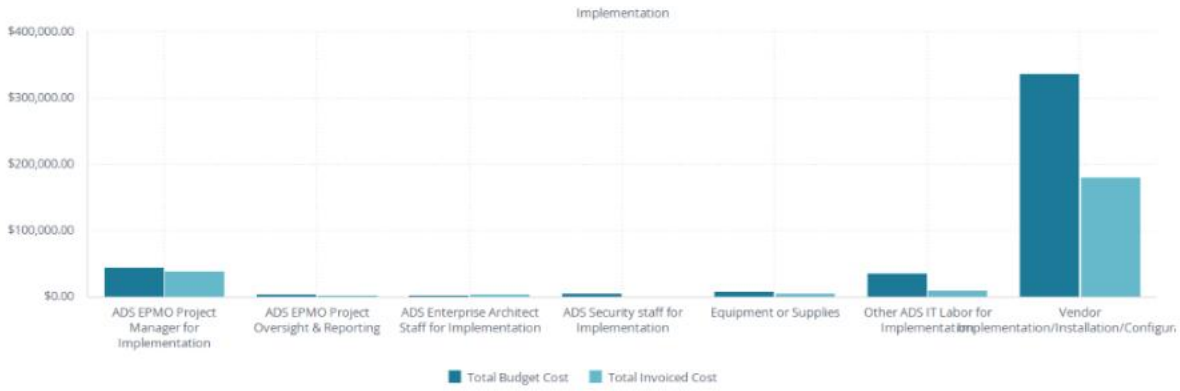
Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Baseline at Contract	Baseline at Contracting	11/18/21	6/30/26	Schedule end date changed and costs changed due to executed contract.
Initial Estimated Project Start-Finish Dates	Initial Estimate	11/18/21	12/31/24	Schedule Based on Initial IT ABC

LURB ACT Scanning Budget Summary

Scanning Actual Project Costs through December 2025

Budgeted vs Actual Invoiced Implementation Costs



Project Name	SAS - Case Management System (CMS)				
Agency/Department	Other State's Attorneys and Sheriffs		**Current Project Phase**		Execution
Original Project Start Date	11/1/2021	**Original Project Estimated End Date**	6/30/2026	**Number of Change Orders Approved**	0
Actual Start Date	5/9/2024	**Current Estimated End Date**	6/30/2026		

Project	Status	Update
Scope	**ON TRACK**	No amendments to the scope of the project have been requested or completed. Integration progress is underway with the Judiciary and DPS.
Schedule	**ON TRACK**	As a result of progress with the Judiciary/SAS integration, the project team has chosen late February/early March 2026 go-live time frame. There is nothing to indicate this milestone will not be reached.
Budget	**MANAGEABLE RISKS**	Costs are on track with the implementation vendor and project management consultant. It does not appear that there will be any additional cost for the integration between SAS and the Judiciary. Project teams from the Department of Public Safety (DPS), SAS, Crosswind, and Matrix are working to complete an SOW so that the cost of integration between DPS and SAS can be determined.
Overall	**ON TRACK**	

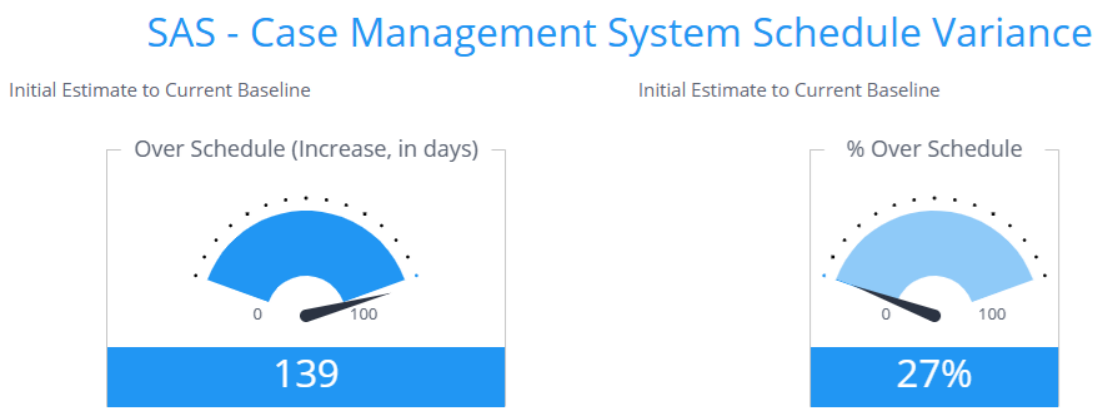
Scope Summary

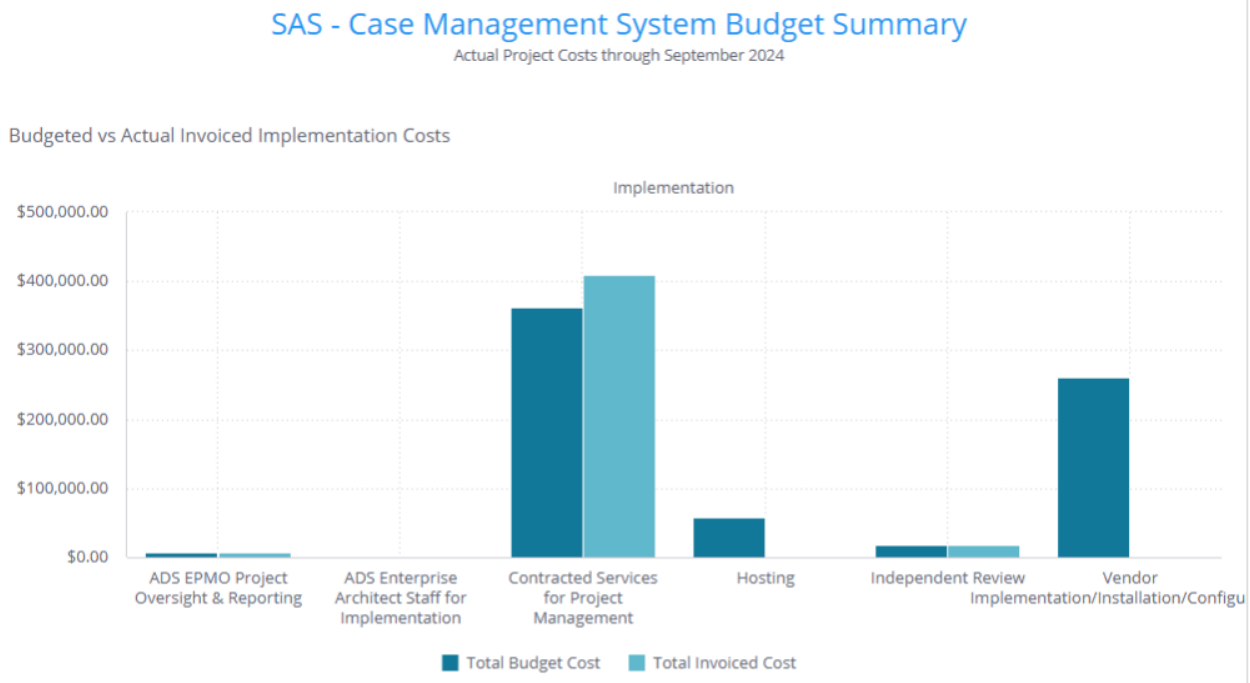
The SAS Case Management System (CMS) Project is a transformative initiative that seeks to modernize and streamline case management processes for the State's Attorneys and Sheriffs Department in Vermont. By implementing a new CMS, the project aims to enhance efficiency, collaboration, and data integration by interfacing with the VT Judiciary Odyssey system and Valcor's Crosswinds. The project's primary objective is to implement a robust and user-friendly Case Management System that meets the specific needs of the SAS. This system will enable the SAS to efficiently manage their cases, track progress, and ensure timely resolution of legal matters. To ensure seamless integration and data sharing, the new CMS will interface with the VT Judiciary Odyssey system. This integration will enable the SAS to access relevant case information, court records, and updates directly from the judiciary system. This streamlined data exchange will enhance collaboration between the SAS and the judiciary, promoting efficiency and accuracy in case management. Additionally, the CMS will interface with Valcor's Crosswinds computer-aided dispatch/record management system. This integration will enable the SAS to access critical information related to law enforcement activities, such as incident reports, dispatch records, and other relevant data. This interface will facilitate seamless information sharing between the SAS and law enforcement agencies, enhancing coordination and efficiency in their operations. By implementing the SAS Case Management System, the project aims to improve data integration, streamline processes, and enhance collaboration between the SAS, the judiciary, and law enforcement agencies. The new CMS will provide a user friendly interface for case management, enabling SAS personnel to easily track and manage their cases, access relevant information, and generate reports. The SAS Case Management System (CMS) Project represents a significant step towards modernizing and improving case management processes for the State's Attorneys and Sheriffs Department in Vermont. By implementing a new CMS that interfaces with the VT Judiciary Odyssey

system and Valcor's Crosswinds, the project aims to enhance efficiency, collaboration, and data integration. This initiative reflects the commitment of the SAS to provide effective and efficient legal services and law enforcement support to the people of Vermont.
Schedule Summary
This project is currently in execution and on schedule. The implementation vendor continues to make progress with configuration. Integrations with the state judiciary are on track to be operational at go-live. Go-live is currently scheduled for late February, early March 2026. Integrations with the Department of Public Safety (DPS) have seen recent progress, but there availability for go-live is uncertain at this time. The integration with DPS is not considered go-live critical.

Budget Summary		
Total Original Estimated Implementation Cost	**Total Current Estimated Implementation Cost**	**Budget Status – On Track, Over or Under Budget**
$704,409.00	$877,563.00	**OVER BUDGET**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$1,333,906.95	$1,333,905.00	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$2,038,315.95	$2,211,468.00	**OVER BUDGET**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts




SAS - Case Management System Budget Summary
Actual Project Costs through September 2024
Budgeted vs Actual Invoiced Implementation Costs
Implementation
$500,000.00
$400,000.00
$300,000.00
$200,000.00
$100,000.00
$0.00
ADS EPMO Project Oversight & Reporting
ADS Enterprise Architect Staff for Implementation
Contracted Services for Project Management
Hosting
Independent Review
Vendor Implementation/Installation/Configu
Total Budget Cost
Total Invoiced Cost

IT ACTIVITY ANNUAL SUMMARY REPORT					
Project Name	VCCB - Cannabis Control Board Application				
Agency/Department	Other Vermont Cannabis Control Board		**Current Project Phase**		Execution
Original Project Start Date	11/15/2021	**Original Project Estimated End Date**	11/30/2025	**Number of Change Orders Approved**	0
Actual Start Date	9/9/2022	**Current Estimated End Date**	11/30/2025		

Project	Status	Update
Scope	**MANAGEABLE RISKS**	Phase 1 and 1A scope has been completed. Phase 2 scope, including, Enforcement, Appeals, and Medical, is on hold pending business decisions about items in the operations backlog. These decisions will affect the scope of Phase 2.
Schedule	**NEEDS LEADERSHIP INTERVENTION**	Phases 1 and 1A are complete. Business decisions regarding the operations backlog will impact the Phase 2 requirements, sequence of work, and the timing of Phase2 .
Budget	**MANAGEABLE RISKS**	The original baseline budget for implementation was $2,092,231.00. Additional scope, via new Statements of Work (SOWs) and SOW amendments, has increased implementation to $3,297,097.00. The total project budget was updated to $4,227,022.00.
Overall	**NEEDS LEADERSHIP INTERVENTION**	

Scope Summary

The Cannabis Control Board Application Implementation project is a key initiative to improve how cannabis licensing and regulation are managed in Vermont. This project aims to make the process more efficient, transparent, and compliant. It is divided into two phases: Phase 1 focuses on licensing, product registration, and inventory tracking, including the new Propagator License. Phase 2 will add features for managing medical cannabis programs, enforcement, appeals, and a public registry. The application will serve as a central platform for all stakeholders, streamlining workflows and improving communication. This project is committed to supporting the cannabis industry's growth by ensuring regulatory processes are up-to-date and effective, adapting to legislative changes and industry need.

Schedule Summary

Phase 1 (Licensing) was completed in early 2023, and Phase 1A (Product Registration and Inventory Tracking) was completed in early 2025. Phase 2 (Medical Cannabis, Enforcement, Appeals, and a Public Registry) is currently on hold pending business decisions on the operations backlog. These decisions will affect the scope and timing of Phase 2.

Budget Summary

Total Original Estimated Implementation Cost	Total Current Estimated Implementation Cost	Budget Status – On Track, Over or Under Budget

$1,463,335.00	$2,030,337.20	**OVER BUDGET**
Total Original Estimated Operating Cost	**Total Current Estimated State Operating Cost**	**Budget Status – Over or Under Budget**
$1,331,375.00	$264,535.00	**ON TRACK**
Total Original Estimated IT Activity Cost	**Total Current Estimated State IT Activity Cost**	**Budget Status – Over or Under Budget**
$2,794,710.00	$2,294,872.20	**UNDER BUDGET**
Solution Lifecycle Years	5	

Schedule Variance and Budget to Actuals Charts

VCCB Cannabis Control Application Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

814

Initial Estimate to Current Baseline

% Over Schedule

275%

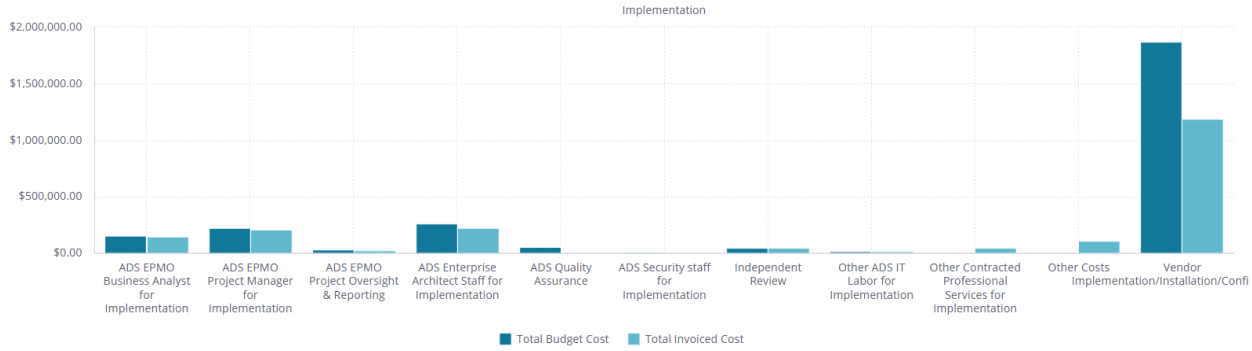
Schedule Estimates

Estimate Name	Estimate Stage	Project Start Date	Project End Date	Change Narrative
Baseline at Contracting	Baseline at Contracting	11/15/21	1/2/23	MTX
Revised	Baseline 8	11/15/21	6/28/24	Phase 1A
Revised Estimate	Baseline 2	11/15/21	11/2/22	TechM
	Baseline 3	11/15/21	3/31/26	Phase 2 timeline is unknown due to business decisions needed on the operations backlog.

Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



Agency of Digital Services: Strategic Plan 2024-2028

Agency of Digital Services
Strategic Plan 2024–2028

VISION : To provide government services that are secure and easily accessible to all people doing business and interacting with the State of Vermont.

Mission: To collaborate with our partners in state government to deliver simple and intuitive technology solutions that improve the lives of Vermonters.

STRATEGY

SIMPLIFYING TO REDUCE COMPLEXITY

- Strengthen our digital foundation by replacing legacy IT systems with Integrated preferred enterprise platforms, thereby reducing technical debt.
- Deploying new systems by utilizing cloud-based offerings to reduce our infrastructure footprint and total cost of ownership.
- Enable AI responsibly and securely while maintaining the highest standards

BREAKTHROUGH INDICATORS

- 5 existing infrastructure-based systems migrated from OnPrem to Cloud Managed Services.
- Replacement of 30 legacy applications with State-preferred enterprise platforms.

STRATEGY

USER EXPERIENCE

- Increase the number of simple, low-cost, online interactions that Vermonters have with their government.
- Build a closer online relationship with Vermonters, including single sign-on capability
- Improve Vermonter's experience with state government by transitioning outdated paper processes with online, streamlined services.

BREAKTHROUGH INDICATORS

- 48 public-facing applications utilizing myvermont.gov single sign-on
- Provide 10 native mobile applications as alternative to existing public-facing services
- 50 public-facing processes automated with next-generation technology

STRATEGY

ENHANCING STANDARDS

- Raise employee and Vermonter awareness of cyber risk and data privacy through training and reporting
- Coordinate cybersecurity policies and practices throughout State Government
- Improve data-driven decision making related to public health and safety through the development of robust data analytics, governance, and management systems
- Establishment of Core Enterprise Services as the foundation available to every user, agency, and department in state government.

BREAKTHROUGH INDICATORS

- 90% completion of Cyber-awareness training quarterly by state employees
- Application and data risk evaluations integrated into the 12 cabinet-level IT investment plans by 2025
- 12 cabinet-level agencies and departments with technology risk evaluation report cards by 2024
- Standard Service model of IT support of all Core Enterprise Services delivered by 2024
- 5 data sets available for analysis in the new data environment by 2024
- All Dashboards and analytics available through PowerBI by 2024

STRATEGY

PREDICTABILITY AND TRANSPARENCY

- Proactively reduce the number of applications through consolidation and elimination. This will result in lower IT maintenance costs, purchasing costs, licensing costs, and employee costs over the life cycle.
- Improve the 5-year IT roadmap and investment plans for all agencies aligned to the ongoing modernization of government
- Utilize improved standards to provide timely and accurate budget and expenditure information to IT decision-makers.
- Continue focus on investment and services in cybersecurity and core enterprise services

BREAKTHROUGH INDICATORS

- 12 cabinet-level agencies to have a complete 5-year IT roadmap and investment plans that are updated annually by 2024
- Track spending of managed and supported services as well as bespoke purchase investments.
- A minimum of 10% of IT budget dollars invested in security initiatives by 2025
- Implement a technology business management solution for financial transparency by 2024

VERMONT

For More Information

See the ADS website at http://digitalservices.vermont.gov/

See the EPMO website at http://digitalservices.epmo.vermont.gov/
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