

**ATTACHMENT Q  
DMS-17/18-023  
DMS PMO TRANSITION PLAN REQUIREMENTS,  
DEPARTMENT OF MANAGEMENT SERVICES**

**PROJECT MANAGEMENT DELIVERABLES**

All references to a Vendor “Project,” “Project Manager,” or “Project Management Plan” in this document will be applicable to the transition plans described in SECTION 4.2.2e of the RFP. The PMO Manager, DMS Project Manager, or their designees, will use the following criteria to determine when each deliverable is considered complete and acceptable. The Vendor Project Manager will submit all deliverables listed below electronically. All deliverables will be reviewed based on the criteria defined in the Contract and its associated documents.

All deliverables for this section will be tied to financial consequences for Service Area Three, as defined in Attachment A – Draft Contract.

Best practices for project management are found in Rule 74-1, F.A.C and shall be followed regardless of a project’s IT categorization.

Deliverable 1	<p><b>PROJECT MANAGEMENT PLAN DELIVERABLE</b></p> <p>Due: Within six weeks of the contract execution.</p> <p>Minimum Acceptance Criteria: A Microsoft Word 2016 (or higher) document shall be provided. The deliverable shall meet the requirements of F.A.C. Rule 74-1.004, Project Category 4. All Project Management Plan (PMP) subsidiary plans contained in Rule 74-1.004, F.A.C., project category 4 are required.</p> <p>The Vendor shall provide overall project management support for the activities, deliverables, and work products identified in the Contract, including the day-to-day management and administrative support of its staff and activities to successfully achieve the Solution goals. The Department will maintain project management responsibilities for the Project and State staff. The Vendor shall provide project management tools/templates, for DMS approval, and work closely with the Department’s Project Manager and Project Management Office (PMO) to assist in establishing and operating the PMO for the Project.</p> <p>The Vendor’s Project Management approach shall have a foundation in established methodologies and standards, such as those found in the Project Management Institute’s (PMI) Project Management Body of Knowledge (PMBOK®) and IT Infrastructure Library (ITIL®) wherever applicable.</p>
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	<p>The Vendor shall provide highly qualified project management staff to manage the work planning effort, maintain the project schedule, proactively manage all aspects of project performance, and be actively engaged in the project’s day-to-day operations. In addition, the Vendor shall apply methods and tools such as, but not limited to, forecasting, metrics, analyses, modeling, and scorecards/dashboards to measure and assess performance efficiency, progress, productivity, and quality. The Vendor shall provide any tools necessary to support the management of its staff and the execution of each project management process.</p>
<p>Deliverable 2</p>	<p><b>PROJECT SCHEDULE DELIVERABLE</b></p> <p>Due: Initial schedule for DMS approval is due within 10 business days of contract execution.</p> <p>Minimum Acceptance Criteria:  Once approved, the schedule will be baselined and updated every week and sent to the DMS Project Manager by noon ET Fridays. Create and maintain a Microsoft Project 2016 (or higher) schedule to incorporate all project activities to the agreed upon Work Breakdown Structure (“WBS”) level. The schedule must include at a minimum: task durations, start and finish dates (baseline and actual), predecessors and successors, resources, deliverables and milestones, and must calculate CPI and SPI earned value metrics. The deliverable shall meet the requirements of F.A.C. Rule 74-1.004, Project Category 4 and the schedule criteria defined in Attachment R.</p> <p>The Vendor shall be responsible for developing and managing a comprehensive, fully resource-loaded project schedule in Microsoft Project that details the Vendor’s implementation approach and includes tasks to be performed by DMS project team and Vendor staff. The project schedule must adhere to the standards defined in the Project Management Plan and must be constructed and maintained in a format compatible with integration into the Schedule Management Plan. The Vendor is responsible for confirming and monitoring that Microsoft Project calculates the critical path as expected.</p> <p>The Vendor shall be responsible for monitoring and updating the project schedule continuously, and revising and developing further detail, as appropriate. Changes made to the project schedule to reflect performance delays by the Vendor or its Subcontractors shall not be interpreted to relieve Vendor from contractual accountability for on-time performance of the Implementation Services.</p> <p>The Project Schedule shall include major deliverables and detailed project activities in discrete work packages for assignment to Project Team members. The project schedule shall track and report progress on these activities and deliverables, including, but not limited to, expected results, timeliness of achieving solution deliverables and other significant events.</p>

	<p>Earned Value (EV) analysis shall be used to measure the project's progress at any given point in time, forecast completion dates and cost, and analyze variances in the schedule and budget as the project progresses.</p> <p>The Vendor shall conduct a weekly EV analysis to identify planned versus actual variances and include any variances in appropriate reporting. The Vendor's analysis shall include the EV measures being captured in the project schedule to present a comprehensive analysis. The analysis shall include explanations of variances of EV measures outside of agreed upon targets, effects on other areas, and corrective actions to achieve realignment.</p>
Deliverable 3	<p><b>PROJECT KICKOFF MEETING DELIVERABLE</b></p> <p>Due: Within five business days of contract execution.</p> <p>Minimum Acceptance Criteria: Vendor must conduct a project kickoff meeting with DMS and appropriate stakeholders. Agenda will be developed in MS Word format by the vendor with approval from DMS. Approved agenda must be distributed to all attendees no later than 24 hours prior to the meeting. Vendor is responsible for submitting meeting minutes in MS Word format to the project manager within 3 days of the meeting. Meeting minutes must include: list of invitees, role, actual attendance (indicate attendance by phone or in person), any decisions made, decisions needed, action items (including date assigned, date due, and owner).</p>
Deliverable 4	<p><b>PROJECT MANAGEMENT TRACKING (RAID) LOGS (I.E. RISKS, ISSUES, ACTION ITEMS, DECISIONS, AND CHANGE REQUESTS) DELIVERABLE</b></p> <p>Due: Initial log due within 15 business days of contract execution.</p> <p>Minimum Acceptance Criteria:</p> <p>The log must be submitted in Microsoft Excel format. The Vendor shall identify, assess, document and recommend mitigation strategies by updating the logs at a minimum of bi-weekly to reduce project risks and issues. The deliverable shall meet the requirements of F.A.C. Rule 74-1, Project Category 4.</p> <p>The Vendor is responsible for project status reporting. The DMS project team requires weekly status reports to be provided to reflect the major activities for the reporting period. As part of the Vendor's approach to status reporting, DMS requires weekly participation in status meetings with the DMS Project Team. Project management intends to use the status reports and meetings to verify progress of project activities and to detect potential problems or delays. Topics to be covered include, but are not limited to:</p> <ul style="list-style-type: none"> <li>• Departures from the project schedule with explanations of causes, effects on other areas, and corrective actions to achieve realignment;</li> </ul>

	<ul style="list-style-type: none"> <li>• Changes to project objectives, Scope, schedule, or budget;</li> <li>• Critical path analysis;</li> <li>• Tasks completed since the last report;</li> <li>• Tasks that were delayed and reasons for delay, with expected revised completion dates;</li> <li>• Updates for previously delayed tasks;</li> <li>• Planned activities for the next reporting period;</li> <li>• Vendor staff planned to join or leave the project;</li> <li>• Summary of major concerns or issues encountered, proposed resolutions, and actual resolutions;</li> <li>• Any other topics that require attention from the DMS Project Manager; and</li> <li>• Additional items defined in the PMP.</li> </ul>
Deliverable 5	<p><b>PROJECT STATUS REPORTS DELIVERABLE</b></p> <p>Due: Within 10 business days of the contract execution and by noon Eastern each Friday thereafter.</p> <p>Minimum Acceptance Criteria:</p> <p>The Vendor shall provide a weekly Project Status Reports and conduct monthly Project Reviews with the DMS Project Manager, PMO Manager, and others as identified, detailing the previous period’s achievements and progress on upcoming and existing activities; changes; identified risks and recommendations to mitigate risk, communicate forecasts; and assess project progress. These meetings may be in person or conference call at the discretion of the project manager.</p> <p>A Microsoft Word 2016 (or higher) document shall be provided as written status reports beginning within 10 business days of the contract signing and weekly thereafter, until completion of the Project. Status reports are due via email to the DMS Project Manager by noon Eastern Time (“ET”) each Friday (unless instructed otherwise in writing by the DMS Project Manager) and shall include:</p> <ul style="list-style-type: none"> <li>• A narrative description of significant project activities that have been conducted or are underway</li> <li>• The progress-to-date on project activities</li> <li>• An explanation of any tasks/activities that are behind schedule and a plan to bring them current</li> <li>• Notification of issues or risks that have been encountered and their resolution or plan for future resolution</li> <li>• Goals or upcoming deadlines</li> </ul> <p>The Project Manager will provide a template for the vendor to ensure all data elements are provided.</p>

<p>Deliverable 6</p>	<p><b>PROJECT MEETING AGENDAS AND SUMMARIES DELIVERABLE</b></p> <p>Due: Within five business days of contract execution.</p> <p>Minimum Acceptance Criteria:  Vendor will develop agendas for any ad-hoc meetings in MS Word format and obtain approval from DMS. Approved agenda must be distributed to all attendees no later than 24 hours prior to the meeting. Vendor is responsible for submitting meeting minutes in MS Word format to the project manager within 3 business days of the meeting. Meeting minutes must include: list of invitees, role, actual attendance (indicate attendance by phone or in person), any decisions made, decisions needed, action items (including date assigned, date due, and owner).</p>
<p>Deliverable 7</p>	<p><b>READINESS PLAN DELIVERABLE</b></p> <p>Due: This deliverable shall be due as part of the Project Management Plan.</p> <p>Minimum Acceptance Criteria:  The Vendor shall deliver a detailed organizational readiness strategy and associated plans that outline a readiness methodology, approach, activities, dependencies, and assumptions for key stakeholders to support a successful transition from current to future technologies and processes. This deliverable shall be due with the Project Management Plan. The deliverable shall meet the requirements of F.A.C. Rule 74-1, Project Category 4.</p> <p>The Vendor shall deliver a detailed organizational readiness strategy and associated plans that outline a readiness methodology, approach, activities, dependencies, and assumptions for key stakeholders to support a successful transition from current to future technologies and processes. The readiness strategy must be aligned with the Vendor’s methodology and timeline. The Readiness Strategy shall be based on: (1) a comprehensive assessment of the State’s capacity for, and tolerance of, change, (2) a stakeholder analysis, and (3) an assessment of the overall change risk.</p> <p>The Vendor shall, at a minimum perform the following organizational readiness services:</p> <ul style="list-style-type: none"> <li>• Identify, assess, and support stakeholders;</li> <li>• Plan, support execution, and identify measures to assess effectiveness of readiness initiatives (updating documentation as appropriate);</li> <li>• Develop a readiness assessment and measurement plan for end users;</li> <li>• Develop an approach to obtain and monitor leadership and executive sponsorship buy-in;</li> <li>• Identify and document the impact of business process redesign on the State;</li> <li>•</li> </ul>

<p>Deliverable 8</p>	<p><b>COMMUNICATIONS MANAGEMENT PLAN DELIVERABLE</b></p> <p>Due: This deliverable shall be due with the Project Management Plan.</p> <p>Minimum Acceptance Criteria: The Vendor shall develop a Communications plan that defines all communication touchpoints between the Project and all impacted stakeholders. The deliverable shall meet the requirements of F.A.C. Rule 74-1.004, Project Category 4. This deliverable shall be due with the Project Management Plan.</p> <p>The Vendor shall develop a Communications Management Plan that defines all communication touchpoints between the Project and all impacted stakeholders. The Vendor shall perform the following communications-related Services:</p> <ul style="list-style-type: none"> <li>• Develop and support execution of a communications plan;</li> <li>• Develop and support a calendar of scheduled communications, integrated with implementation, training, and rollout events;</li> <li>• Identify and track opportunities for communication to relevant partners;</li> <li>• Develop materials appropriate for each communication event. Materials will vary based on the communication channel but may include presentations and documents developed in Microsoft PowerPoint presentations, Microsoft Word, Microsoft Publisher, and similar tools;</li> <li>• Work with assigned DMS staff to incorporate applicable policies, procedures, and specific staff roles into the materials; and</li> </ul> <p>All communication materials must be reviewed and approved by the project team prior to the start of delivery. The Vendor shall provide all electronic source documents and graphics used in the development and presentation of communication materials across all delivery channels.</p> <p>The Vendor shall implement methods to assess and measure the effectiveness of communication events and identify specific recommendations for adjustments, as appropriate. The Vendor shall, throughout the project, improve the approach, methods, procedures, and communication material based on lessons learned throughout execution of the Communications Plan to make sure the end users are receiving communications that enable them to execute tasks within the solution on go-live. The Communications Plan must be updated, as necessary, throughout the project.</p>
<p>Deliverable 9</p>	<p><b>REQUIREMENTS MANAGEMENT PLAN DELIVERABLE</b></p> <p>Due: This deliverable shall be due as part of the Project Management Plan.</p> <p>Minimum Acceptance Criteria:</p>

	<p>The Vendor is responsible for managing all business requirements and validating that they are ultimately met during implementation. The Vendor Project Manager will work with the DMS Project Manager to develop and administer a plan to effectively manage requirements throughout the Transition Project. The Vendor must utilize sound methodologies and employ sufficient tools, including a Requirements Traceability Matrix (RTM), to appropriately identify, approve, document, and implement requirements throughout the requirements management process.</p> <p>The Vendor shall deliver a Requirements Management Plan that describes the processes and tools used to facilitate the analysis, progressive elaboration, documentation, and control of Business Requirements throughout the Project.</p> <p>The Vendor must facilitate the finalization of the Business Requirements, which builds upon requirements confirmation, fit/gap analysis, and gap resolution.</p> <p>Vendor must facilitate and lead a business requirements confirmation activity and work collaboratively with the project staff to understand the expectations of the project team for each requirement. The confirmation activities shall include the validation of the phasing of business requirements and acceptance criteria for each phase. Business requirements may be added, split, changed, or deleted during confirmation activities.</p> <p>The expected result of these activities is a confirmed set of Business Requirements.</p>
<p>Deliverable 10</p>	<p><b>LESSONS LEARNED DELIVERABLE</b></p> <p>Due: Lessons learned deliverable will be due 10 days following the close of the transition project.</p> <p>Minimum Acceptance Criteria:</p> <p>Lessons learned meeting, the creation of a lessons learned document and action plan. The Vendor shall complete a lessons learned meeting and create a lessons learned document and action plan for implementing the lessons learned. Lessons learned deliverable will be due 10 days following the close of each quarter.</p>
<p>Deliverable 11</p>	<p><b>PROJECT RETROSPECTIVE DELIVERABLE</b></p> <p>Due: The project retrospective meeting shall be conducted within 15 days of project completion.</p> <p>Minimum Acceptance Criteria:</p> <p>The vendor shall facilitate an in-person project retrospective meeting.</p>

Deliverable 12	<p data-bbox="488 197 1089 226"><b>THE PROJECT CLOSURE REPORT DELIVERABLE</b></p> <p data-bbox="488 268 1393 333">Due: This deliverable is due within 5 days of the project retrospective or the end of the warranty period, whichever comes later.</p> <p data-bbox="488 375 854 405">Minimum Acceptance Criteria:</p> <p data-bbox="488 432 1427 567">The Vendor shall the complete project closure services by creating a lessons learned document and action plan for implementing the lessons learned based on the project, retrospective, and applicable warranty period. The report will be in MS Word format and delivered to the Project Manager.</p>
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