P-3: FX PROJECT MANAGEMENT TOOLKIT

Integrated Tools and Methods

TOPICS

3 Introduction

7 Background

23 FX Project Management Standards

101 Q & A

The Project Management Toolkit

INTRODUCTION

Uses for this Guide

- Orient the Florida Health Care Connections (FX) Project teams to standard project management approach
- Help navigate the FX organization
- Reference guide for the tools and templates that project teams will use throughout the FX Project Life Cycle (FXPLC)

Goals of the Toolkit

- Educate FX Project teams to the standards required of all FX projects
- Introduce FX Project teams to the processes, tools, and templates complementing the FX Standards
- Enhance FX Project teams' efforts toward a successful outcome

Referenced Documents

- Project Management Institute. 2017. A Guide to the *Project Management Body of Knowledge (PMBOK® Guide)*. Sixth Edition.
- Project Management Institute. 2017. *The Standard for Program Management*. Fourth Edition.
- Project Management Institute. 2017. *The Standard for Portfolio Management*. Fourth Edition.
- Project Management Institute. 2011. *Practice Standard for Scheduling*. Second Edition.
- Project Management Institute. 2006. *Practice Standard for Work Breakdown Structures*. Second Edition.
- Project Management Institute. 2016. *Benefits Realization Management Framework*.
- The Department of Management Services (DMS), Florida Information Technology Project Management and Oversight described in Florida Administrative Rule 60GG-1.001 through 60GG-1.009, Florida Administrative Code (F.A.C.).
- The DMS Florida Cybersecurity Standards described in Florida Administrative Rule 60GG-2.001 through 60GG-2.006, F.A.C.
- The DMS Information Technology Architecture Standards for Identity Management described in Florida Administrative Rule 60GG-5.001 through 60GG-5.003, F.A.C.
- DMS' *Tips for Effective Schedule Development and Maintenance*.
- CMS MITA Framework.
- SEAS Contract MED191 including all amendments to the Contract, and subsequent SEAS Task Orders.
- The Invitation to Negotiate (ITN) 001-16/157, Strategic Enterprise Advisory Services (SEAS).
- FX Project Management Standards: SEAS Contract Deliverable No. P-2.
- Design and Implementation Management Standards: SEAS Contract Deliverable No. T-7.
- Medicaid Enterprise Certification Management Plan: SEAS Contract Deliverable No. P-4.
- Strategic Project Portfolio Management Plan: SEAS Contract Deliverable No. S-4.
- FX Governance Plan: SEAS Contract Deliverable No. S-1.
- FX Enterprise Project Management Office (EPMO) Charter and Program Management Plan (O-2).
- FX Organizational Change Management (OCM) Plan.
- FX Artifact Management Standards (AMS).
- FX EPMO Task Estimation Guidance, available in the FX Projects Repository. All initial Agency approved documents are stored and archived in the FX Hub as final drafts in accordance with the AMS and documented later in this version or in the Project Management Plan template.

Background

- What is FX?
- The Role of the SEAS Vendor
- What is the FX EPMO?

What is FX?

FX Organization

- FX encapsulates everything that is affected by the transformation of Medicaid service delivery
- FX projects are:
  - Authorized by FX Governance through the FX Portfolio
  - Directed by FX EPMO
- FX Project teams are influenced by the Agency for Health Care Administration (Agency) stakeholders and external to the Agency stakeholders such as providers, recipients, and third-party service providers

The Role of the SEAS Vendor

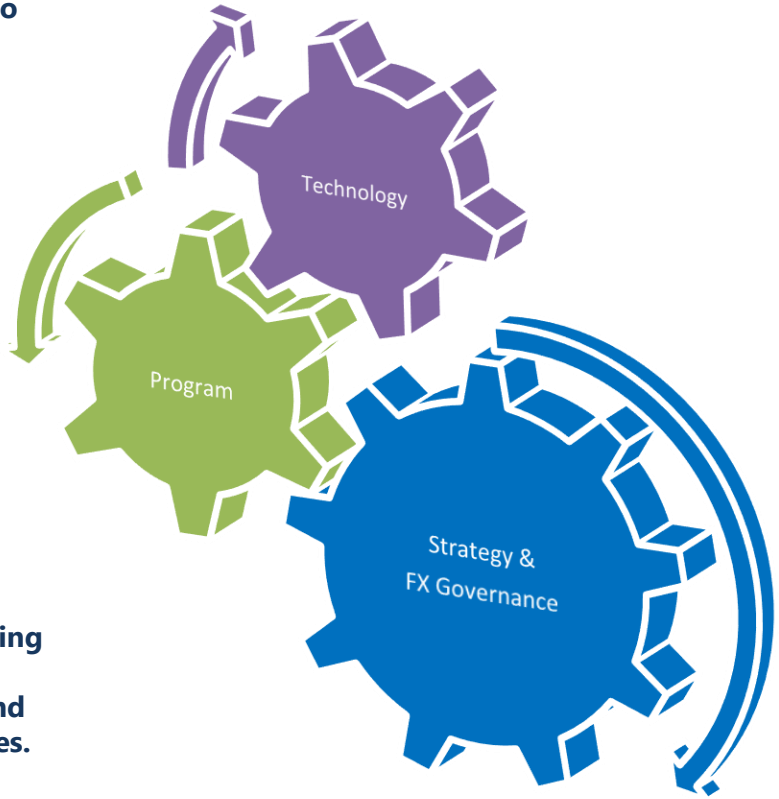
The Role of the SEAS Vendor

- Strategic Enterprise Advisory Services (SEAS)
  - The SEAS Vendor develops the technical standards and proposes solutions for FX in accordance with the Centers for Medicare and Medicaid Services (CMS) Conditions and Standards, including Medicaid Information Technology Architecture (MITA) 3.0
  - The SEAS Vendor also provides programmatic and technical advisory services for the Agency
- The Agency accepted the 17 initial deliverables in FY 2017-18 and the SEAS Vendor is now executing those plans and performing the annual refresh

The Role of the SEAS Vendor (cont.)

The SEAS Vendor provides the technical advisory expertise to identify solutions that meet current and future business needs of FX.

- Enterprise Program Management Office
- Business Analysis



- System Architecture
- Data and Analytics
- FX Strategy
- FX Portfolio

We do this by providing ongoing strategic, technical advisory, and programmatic services.

SEAS Management

What is SEAS tasked with?

The SEAS Vendor was tasked with areas such as the following:

FX Enterprise Program Management Office (EPMO)

- Changes, Risks, Action Items, Issues, Decisions, and Lessons Learned (CRAIDL) Management and Reporting
- Schedule Management: Master Schedule Management and Maintenance
- Quality Management: Maintain artifact management standards and project performance management (e.g., metrics)
- Program Strategy and Oversight: Assist with budgeting efforts, responses to IV&V/DMS findings, Monthly Status Reporting (and others as directed) and deliverable updates
- Project Process Agreement (PPA) and variance maintenance and reporting
- Maintaining program artifacts based on the Deliverable Evolution Topics (DETs) process and as directed by the Agency
- Create project infrastructures, archive projects

What is SEAS tasked with?

The SEAS Vendor was tasked with areas such as the following: (cont.)

Portfolio Management

- Providing input and support for Agency led Legislative Budget Requests (LBRs), Schedule IV-Bs, Operational Work Plans (OWPs), and Advanced Planning Documents (APDs)
- Resource Management of SEAS activities related to assignments to projects and operational activities
- Developing Monthly Impact Analysis Reports
- EPMO and Portfolio Reporting as directed by the Agency
- Supporting Agency Budgeting and Planning Activities
- Supporting inputs into FX Governance
- Maintaining portfolio artifacts based on the Deliverable Evolution Topics (DETs) process and as directed by the Agency

What is SEAS tasked with?

The SEAS Vendor was tasked with areas such as the following: (cont.)

Project Management

Based on the FX roadmap, which informs FX project and operational schedules, as well as Legislative funding appropriated for FX in Fiscal Year 2021-22, SEAS Vendor shall support the below project and operational activities.

- Core System, Provider System modules and Unified Operations Center procurement efforts
- IS/IP Operations
- EDW Implementation
- Centers for Medicare and Medicaid Services (CMS) Interoperability CPAR Planning and Implementation projects
- Support inputs into FX Governance and the Executive Steering Committee (ESC)
- Support the Portfolio with APDs, OWPs, Schedule IV-Bs, and LBRs
- Conduct QA on SEAS Vendor deliverables, work products, artifacts, and other tasks as directed by the Agency
- Conducts QA on project schedules and CRAIDL logs

SEAS Initial Deliverables

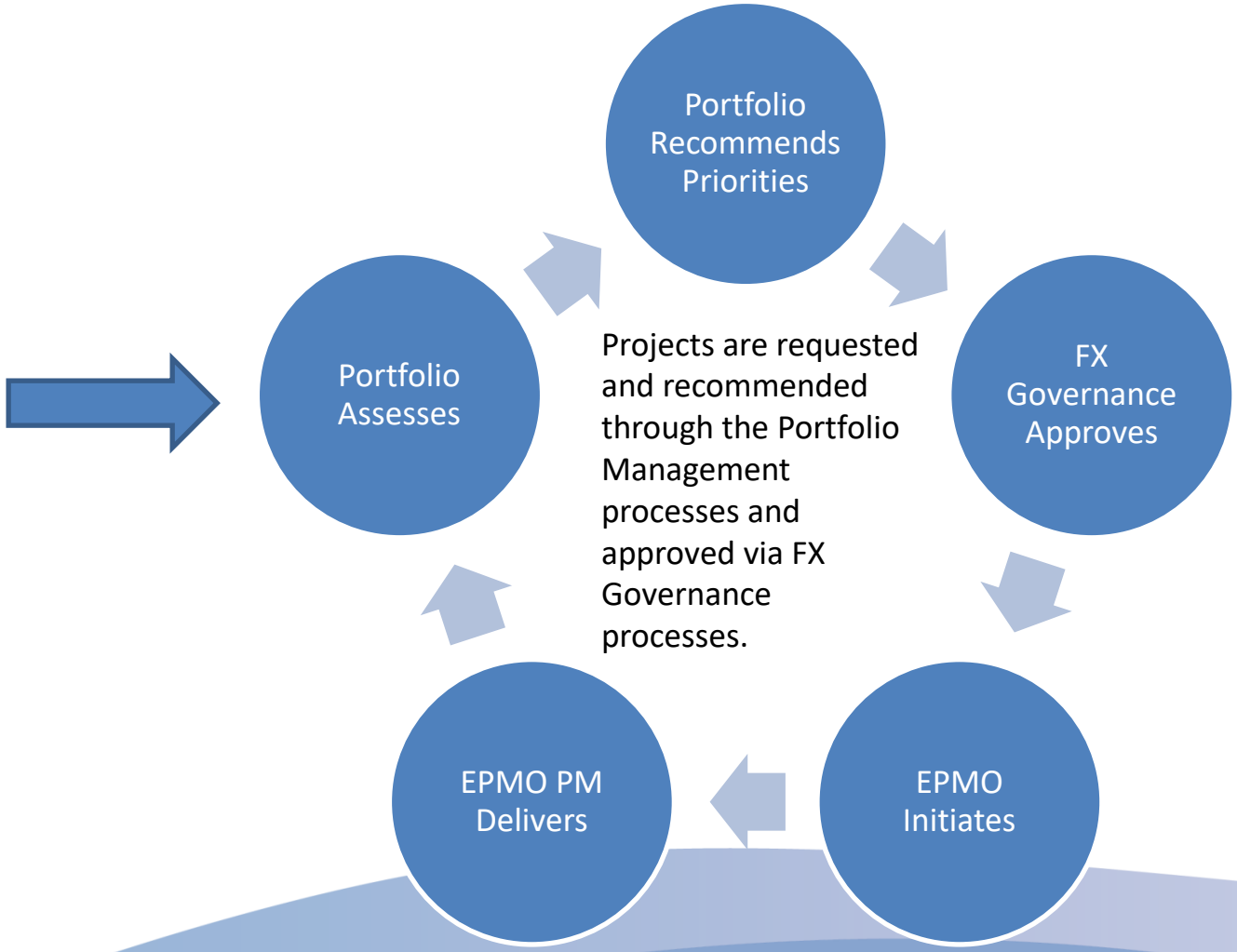
- **S-1: FX Governance Plan –** Sets a system for addressing the issues arising throughout the project.
- **S-2: FX Strategic Planning Training Program –** Trains Agency staff on strategic planning to support the transformation.
- **S-3: FX Strategic Plan –** Defines the Vision for the future FX and the areas of focus to achieve that Vision.
- **S-4: Strategic Project Portfolio Management Plan –** The framework for identifying, prioritizing, and stage-gating FX projects.
- **O-1: SEAS Management Plan –** Outlines how the SEAS Vendor will deliver strategic enterprise advisory services per the contract.
- **FX EPMO Charter and Program Management Plan (O-2) –** Charters the FX EPMO and establishes the guidelines and operational processes for how the FX EPMO shall manage and/or monitor FX projects.
- **P-1: Revised MITA State Self-Assessment and Update Process –** The rating of each MITA Business Processes to gauge MITA maturity.
- **P-2: FX Project Management Standards –** Establishes the processes and controls to manage project work effort to transform the FX.
- **P-3: FX Project Management Toolkit –** The set of tools enabling the FX Project Management Standards.
- **P-4: Medicaid Enterprise Certification Management Plan –** Analyzes the Medicaid Enterprise Certification Toolkit and summarizes the Certification Lifecycle process.
- **T-1: Data Management Strategy –** Provides a structure to improve information management and data sharing across FX.
- **T-2: Information Architecture Documentation –** Connects business process and technical components. Contains Data Management Strategy, Conceptual Data Model, Logical Data Model, and Information Capability Matrix.
- **T-3: Data Standards –** Creates consistent definition of the required format, structure, and rules around data usage.
- **T-4: Technical Management Strategy –** Sets Agency's technology management based on outcome-driven, initiative-based management principles.
- **T-5: Technology Architecture Documentation –** Documents the conceptual overview of the FX and guides development of technical solutions for the FX.
- **T-6: Technology Standards –** Produces standards following guidance defined in MITA 3.0 Part 3 Technical Architecture Chapter 6 Technology Standards.
- **T-7: Design and Implementation Management Standards –** Defines development standards and processes for procurement implementation of FX components.
- **T-8: Enterprise Data Security Plan –** Defines the required protections, processes, and controls to meet compliance requirements, such as the Health Insurance Portability and Accountability Act (HIPAA).

Deliverables will be assessed for needed revisions on at least an annual basis

What is the FX EPMO?

What is the FX Enterprise Program Management Office?

How are projects or programs assigned to the EPMO?

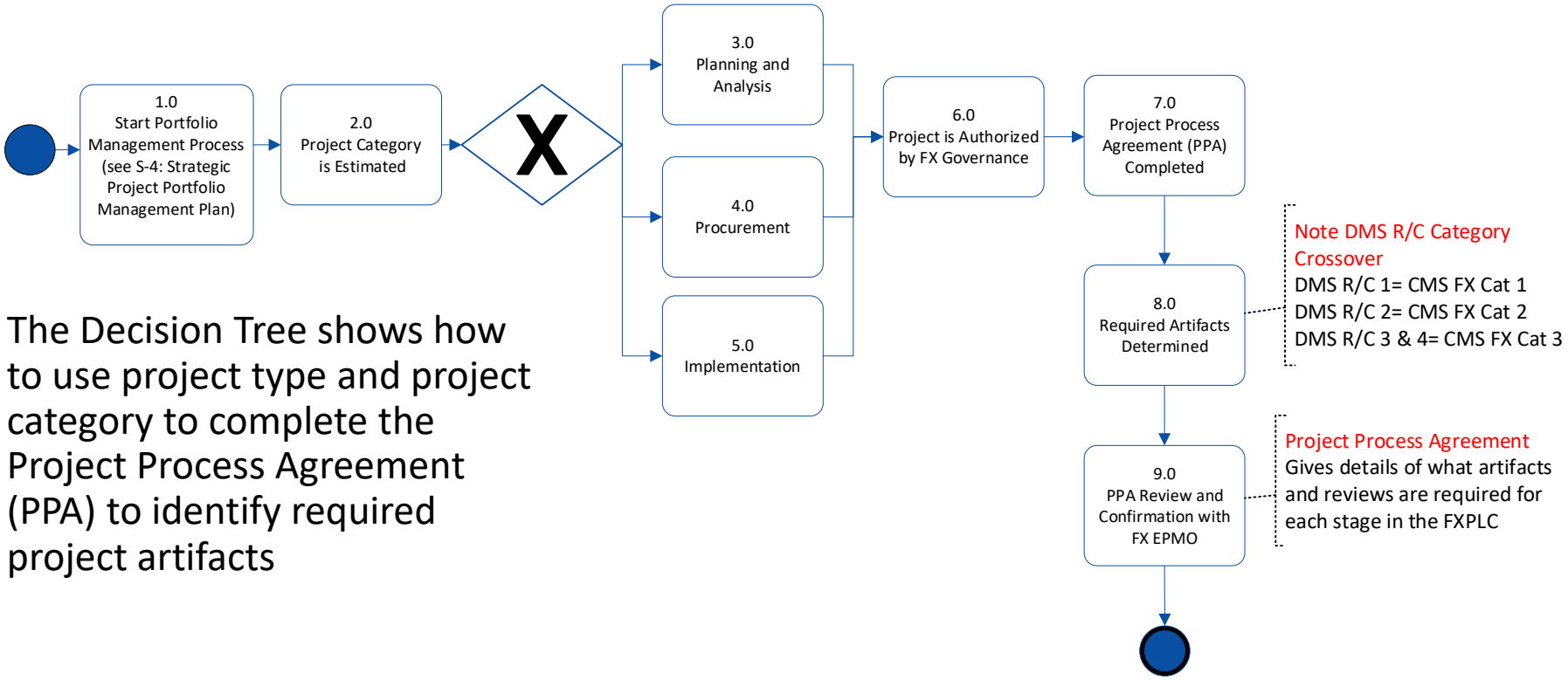


How are Projects or Programs assigned to the EPMO?

- Projects are assigned by the FX Governance for management or oversight by the FX EPMO based on the following criteria:

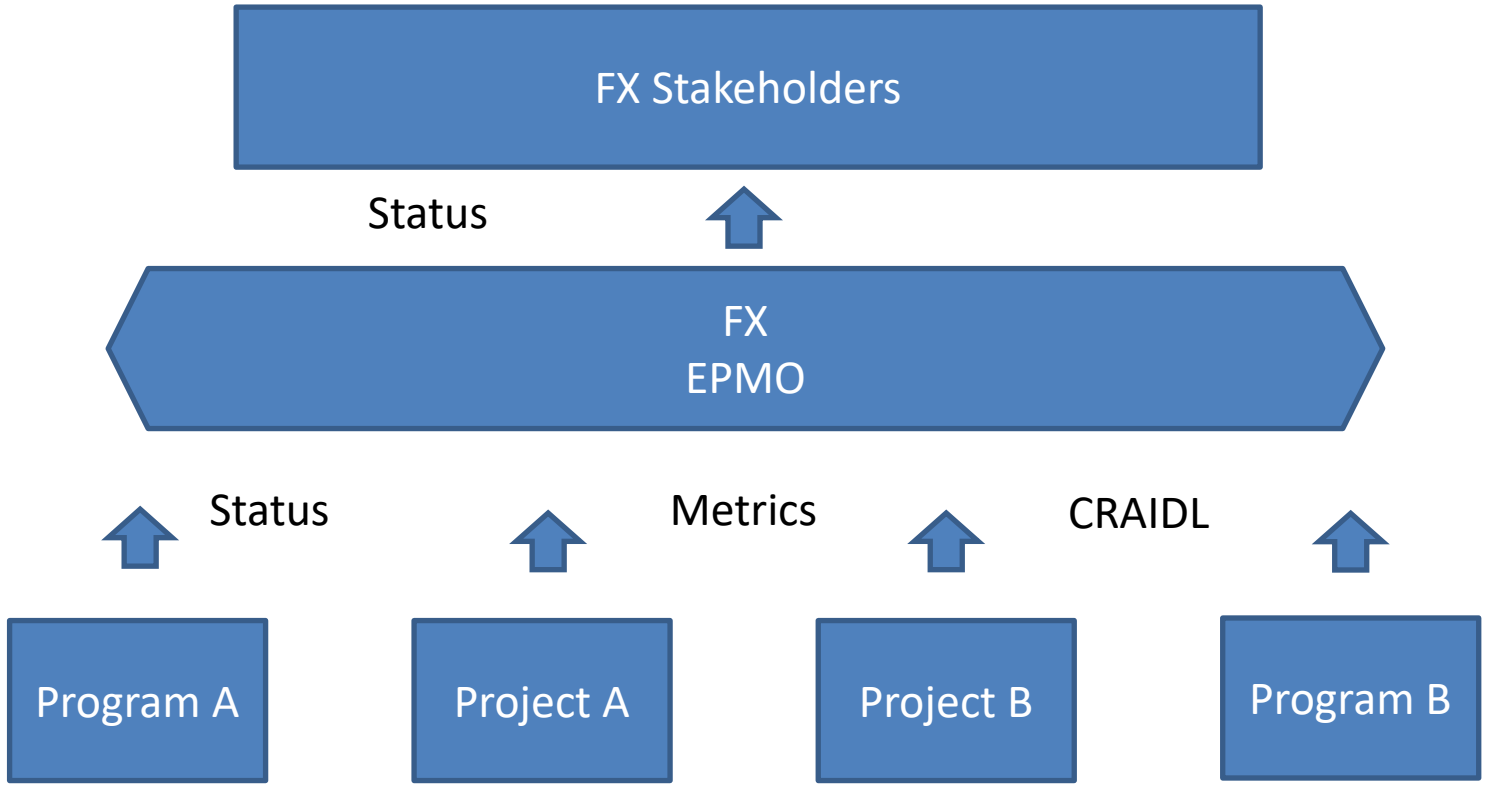
Characteristic(s)	Managed By	Required to follow FX Project Management Standards and report to FX Governance?
Agency-wide FX project	FX EPMO	Yes
Multi-agency FX project led by the Agency	FX EPMO	Yes
FX projects with Risk and Complexity scores of 3 or 4 (per DMS Risk and Complexity tool; whether an IT project or not)	FX EPMO	Yes
FX projects with Risk and Complexity scores of 1 or 2 (per DMS Risk and Complexity tool; whether an IT project or not)	▪ FX EPMO (preferred) ▪ Agency Business Unit ▪ Agency IT	Yes
Non-FX project	▪ Agency Business Unit ▪ Agency IT	No

Project Type and Category



The Decision Tree shows how to use project type and project category to complete the Project Process Agreement (PPA) to identify required project artifacts

FX EPMO Manages Projects and Programs



FX
Project Management Standards

FX Project Management Standards

- FX Project Management Standards
- FX Project Life Cycle
- FX Project Initiation
- FX Project Planning
- FX Project Execution
- FX Project Monitoring and Controlling
- FX Project Close Out

FX Project Management Standards (cont.)

- Are based on:
  - Project Management Institute (PMI)
  - Centers for Medicare and Medicaid Services (CMS)
  - Department of Management Services Project Management and Oversight Standards (Rule 60GG-1.001 through 60GG-1.009, F.A.C)
  - SEAS Contract MED191 and subsequent Task Orders
  - SEAS Invitation to Negotiate (ITN) 001-16/157

FX Project Management Standards (cont.)

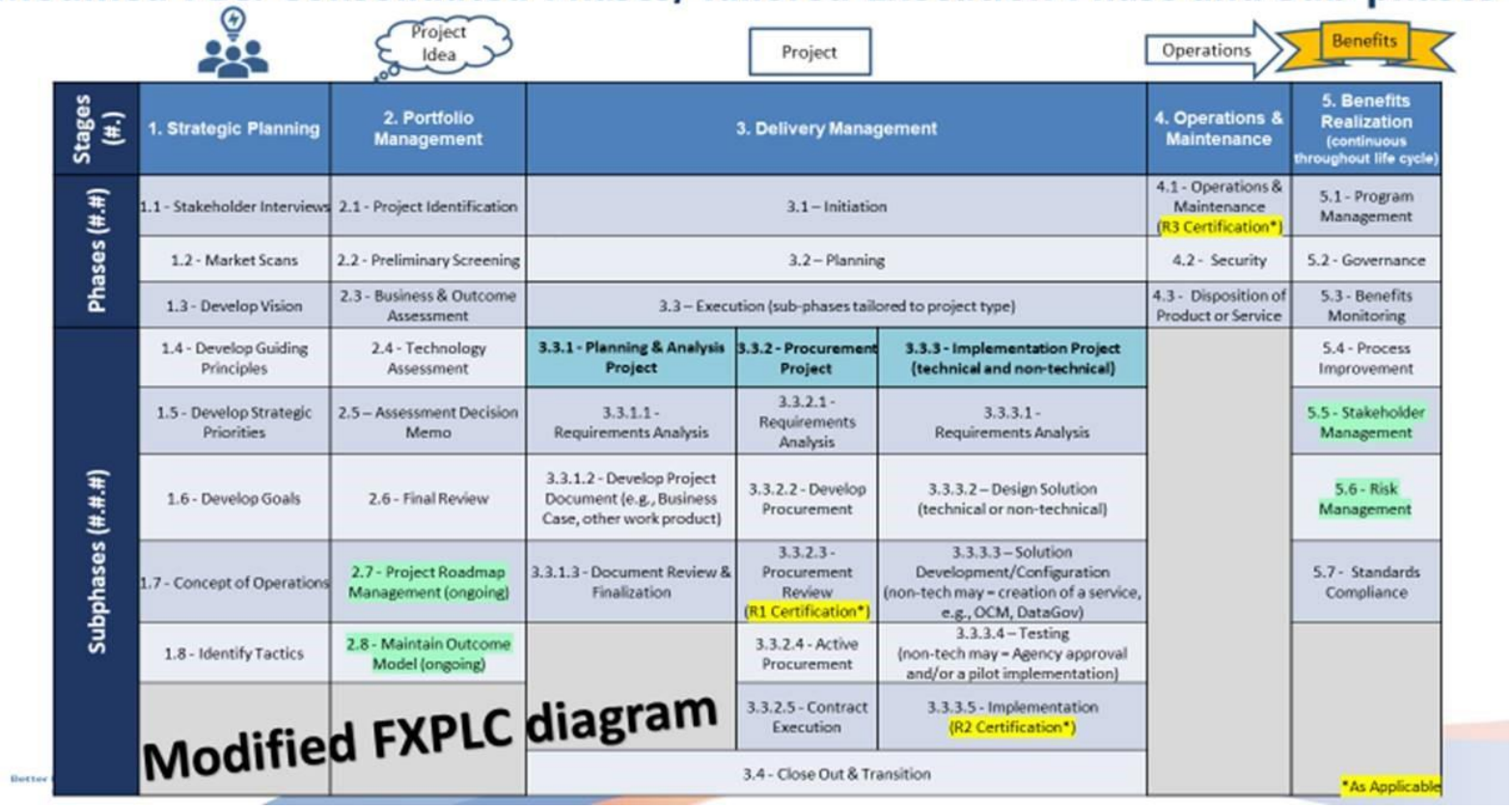
- Align with state standards and management plans
  - T-7: FX Design and Implementation Management Standards
  - P-4: FX Medicaid Enterprise Certification Management Plan
  - S-4: FX Strategic Project Portfolio Management Plan
  - S-1: FX Governance Plan
  - O-2: FX EPMO Charter and Program Management Plan
  - FX Organizational Change Management (OCM) Plan

FX Project Life Cycle (FXPLC)

DRAFT

FX Project Life Cycle

Modified PLC: Consolidated Phases, Tailored Execution Phase and Sub-phases



- FX Project Life Cycle (FXPLC) is a project life cycle based on the CMS eXpedited Life Cycle (XLC) and customized for use by FX projects
- The DMS risk and complexity levels and CMS XLC sizing were mapped to identify required artifacts and reviews

Alignment with Medicaid Enterprise System Certification Standards

The Medicaid Management Information System (MMIS) Certification process is the prescribed validation process from Centers for Medicare and Medicaid Services (CMS) for states to request and obtain enhanced Federal Financial Participation (FFP) to develop, implement, operate, and maintain their MMIS. See the *P-4: MES Certification Management Plan* for details.

CERTIFICATION PHASES	FXPLC PHASES	CMS XLC PHASES
Outcomes Based	▪ Initiation Phase	▪ Initiation Phase
Operational Readiness	▪ Execution Phase	▪ Deliverable: Identifies the discrete deliverables associated with each workstream track. ▪ Release: Identifies releases within system development.
• Certification Request (once module has been operational at a minimum of 6 months) • Certification Review	▪ Project Close Out Phase ▪ Transition to Operations and Maintenance	▪ Operations and Maintenance Phase

FX Project Management Standards

- FX projects will vary in scope, resource requirements, and/or duration
- Regardless of project type, risk, and complexity, each FX Project shall:
  - Initiate project activity demonstrating project knowledge necessary to complete each objective
  - Plan how to execute, monitor, communicate, and control work
  - Break down scope into actionable, sequenced tasks
  - Perform analysis and design the solution to meet the business needs and required project outcomes
  - Execute to outcome
  - Monitor team, tasks, and progress toward outcomes
  - Report performance
  - Document and archive for future reference

Compliance to FX Project Management Standards and Processes

- The state standards, processes, procedures, and templates are designed to follow industry standards and address the requirements of applicable standards
- All FX projects must comply with applicable FX Standards

FX Project Initiation

FX Project Initiation Stage

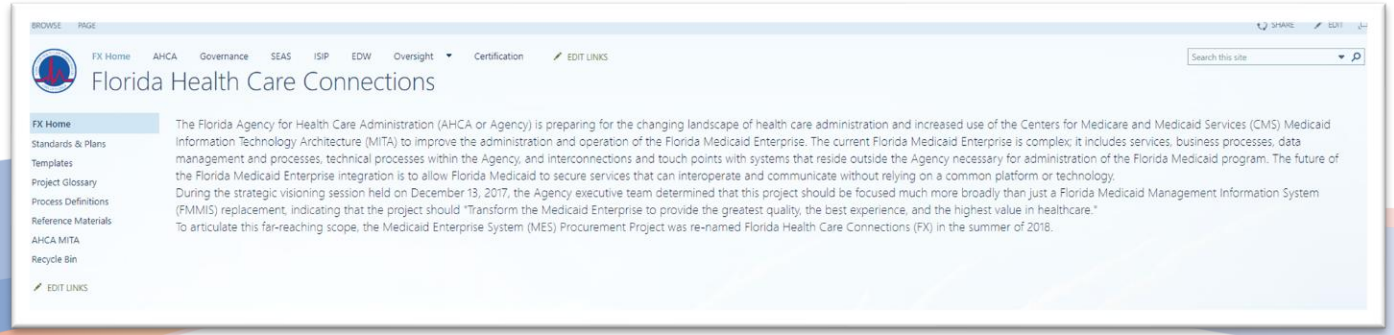
- Project Site Setup (FX Projects Repository) – *Done by FX Program Administration/SharePoint Administrator*
- Project Artifact Directory (PAD) Site Setup – *Done by FX Program Administration/SharePoint Administrator*
- Project Risk and Complexity (R&C) Categorization – Done by FX Project Team
- Project Process Agreement (PPA) Categorization – Done by FX Project Team
- Identify Key FX Project Stakeholders – Done by FX Project Team
- Develop Project Charter – Done by FX Project Team

FX Projects Repository

- All FX Project-related documentation, deliverables, work products, and supporting documentation shall be stored in the FX Projects Repository (FXPR)
- The FX-HUB is the FX Program Reference Repository for current FX Program Standards & Plans, Project Glossary, Templates, Reference Materials, and Process Definitions
- Primary objective for the FXPR structure is to enable all project team members to access program and project documentation

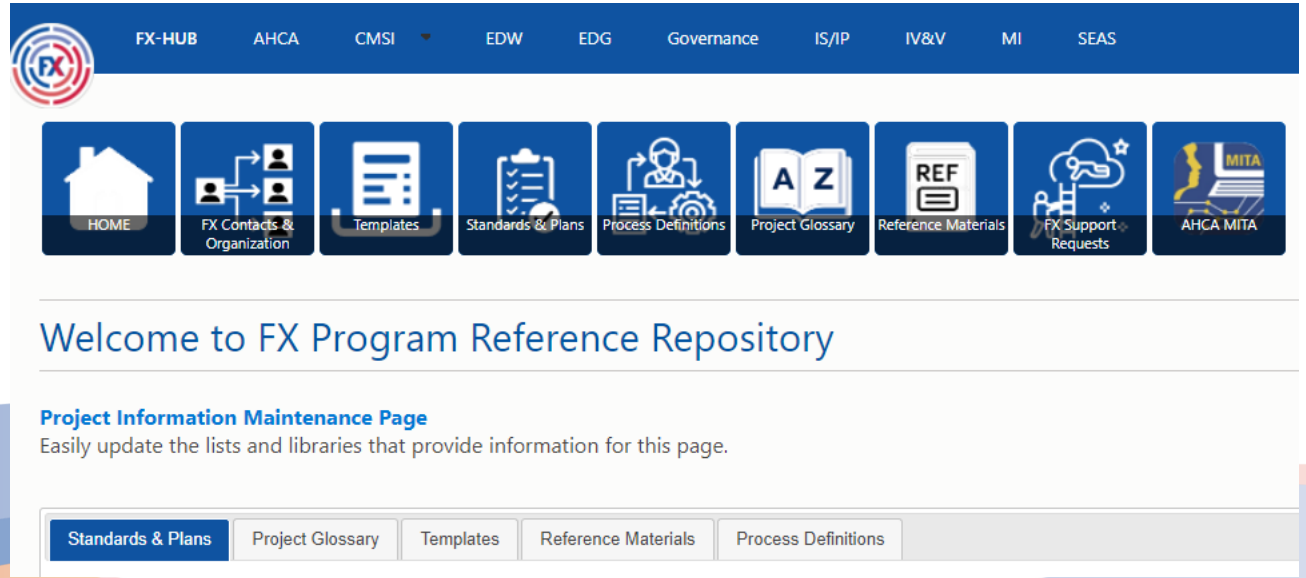
FX Projects Repository (cont.)

- FX Home (Common Area)
  - Standards & Plans
  - Templates
  - Process Definitions
  - Project Glossary
  - Reference Materials
  - Agency MITA
  - Recent
  - FX Program Administration Shared Documents



FX Projects Repository (cont.)

- FX-HUB (FX Program Reference Repository)
  - Standards & Plans
  - Project Glossary
  - Templates
  - Reference Materials
  - Process Definitions



FX Projects Repository (cont.)

- FX Project Site (Workspace)
  - Project Calendar
  - Out of Office Calendar
  - Project Staff List
  - Project Artifact Directory (PAD)
  - Project Logs

Project Risk and Complexity Categorization

Project Management Rule Chapter 74-1, F.A.C.
Agency Compliance Assessment Tool (v. 0.004)

PROJECT MANAGEMENT RULE COMPLIANCE ASSESSMENT SUMMARY

74-1.003 INITIATION					0.00	COMPLIANCE SCORE		
Section: 74-1.003 Initiation						Risk & Complexity Category		
Documentation or Activity:								
Pre-Charter Risk & Complexity Assessment				4				
No.	Requirements	Y/N	R	Score	REQs			
74-1.004 PLANNING					0.00	COMPLIANCE SCORE		
Section: 74-1.004 Planning						Risk & Complexity Category		
Documentation or Activity:								
Project Scope and Objectives								1
No.	Requirements	Y/N	R	Score				REQs
74-1.005 EXECUTION					0.00	COMPLIANCE SCORE		
Section: 74-1.005 Execution						Risk & Complexity Category		
Documentation or Activity:								
Operations & Maintenance (O&M) Plan								1
Project Management Plans								1
No.	Requirements	Y/N	R	Score				REQs
74-1.006 MONITORING & CONTROLLING					0.00	COMPLIANCE SCORE		
Section: 74-1.006 Monitoring & Controlling						Risk & Complexity Category		
Documentation or Activity:								
Monitor & Control Project Change				4				
No.	Requirements	Y/N	R	Score	REQs			
74-1.007 CLOSEOUT					0.00	COMPLIANCE SCORE		
Section: 74-1.007 Closeout						Risk & Complexity Category		
Documentation or Activity:								
Project Closeout Report (PCR)								1
No.	Requirements	Y/N	R	Score				REQs
74-1.009 AGENCY FOR STATE TECHNOLOGY (AST) OVERSIGHT					0.00	COMPLIANCE SCORE		
Section: 74-1.009 AST Oversight						Risk & Complexity Category		
Documentation or Activity:								
Access to Project Documents				4				
No.	Requirements	Y/N	R	Score	REQs			

Pre-Charter Risk and Complexity tabs of DMS R&C Assessment

Project Process Agreement

Tests | Project Reviews | Variances

Project Process Agreement - Artifacts

Project Name	<Enter Project Name>
Project Description	<Enter Project Description>
Project Type	Certified DDI
Complexity Level	3
Project-Specific Items	1

Comments:

Directions:
1) Enter Project Information [Name, Description, Type, Complexity] on the first tab
2) Update Columns E, F, and G as needed
Additional Notes:
Required = Must Do; Optional = May Do; Refrain = Should Not Do
Variances from the Standards in Column D should be accompanied by a justification in Column G
Document general comments at the top of each sheet

A	B	C	D	E	F	G
#	Artifact	Description	Standard Requirement	Proposed Requirement	Proposed Owner	Justification for variance or comments (based on applicability)
1	Acquisition Strategy	The overall objective of an Acquisition Strategy is to document and inform stakeholders about how acquisitions will be planned, executed, and managed throughout the life of a project or investment.	Required	Required	Not Selected	Not Applicable - No variance requested
2	Project Process Agreement	Document that identifies the artifacts that a project must complete to be compliant with the Standards, and required by CMS for certification reviews.	Required	Required	Not Selected	Not Applicable - No variance requested
3	Project Charter	Authorizes the existence of a project and provides the authority to proceed and apply organizational resources.	Required	Required	Not Selected	Not Applicable - No variance requested
4	Project Management Plan	Provides detailed plans, processes, and procedures for managing and controlling the life cycle activities.	Required	Required	Not Selected	Not Applicable - No variance requested
5	Project Schedule	A detailed, sequ... and their interde... If leveraging an A... may be used to ... When conside... complexity, Miles...				...riance requested
		Assesses the p...				...riance requested

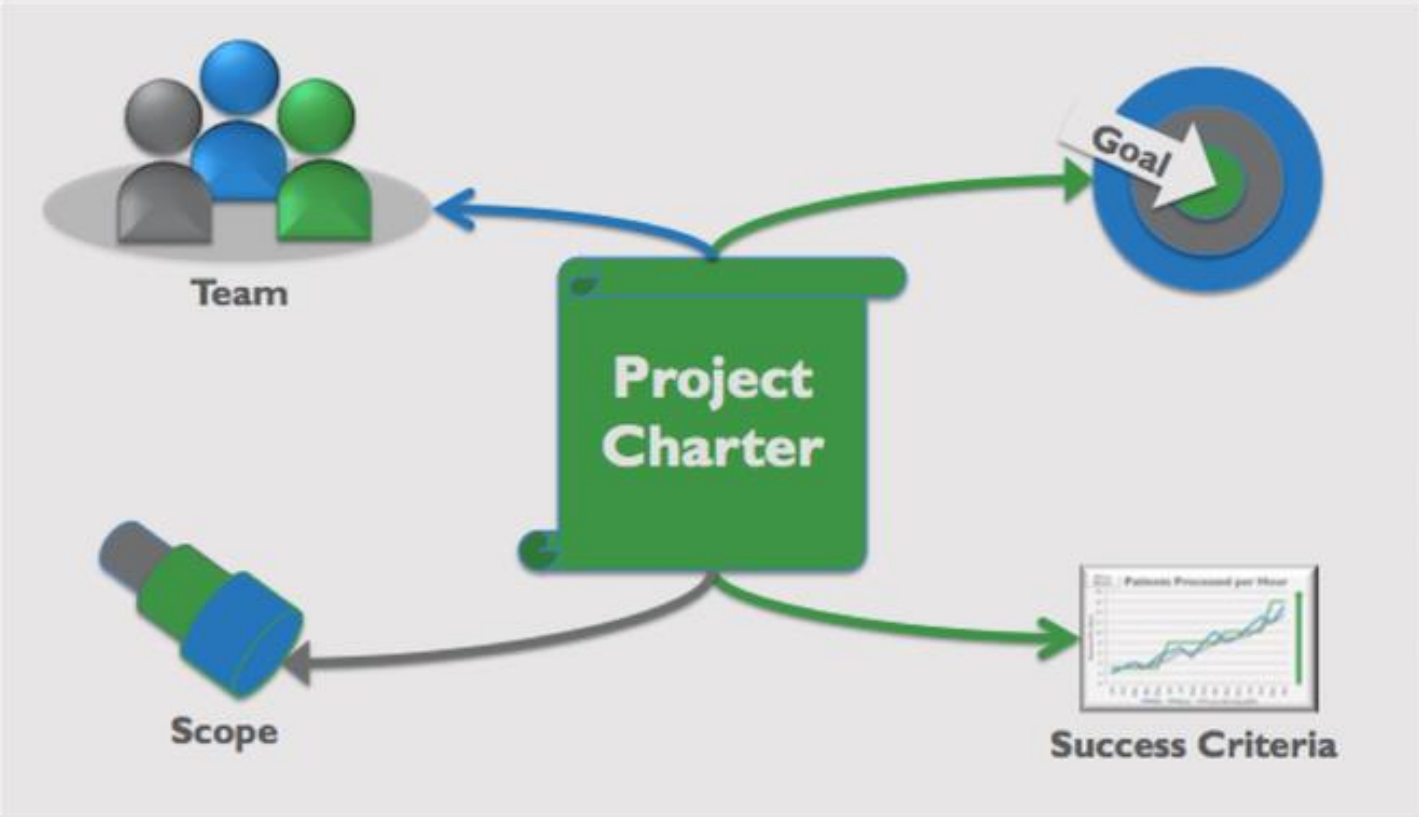
FX PLC PPA - Artifacts | FX PLC

- Adapted from XLC methodology
- Cornerstone of project requirements
- Artifacts / Tools / Templates / Reviews
- FX purposed to fit any size and type of project

Identify Key FX Project Stakeholders

Preliminary FX Project Stakeholder Assessment – Use the FX Stakeholder Analysis to identify key stakeholder groups and subject matter experts

Develop Project Charter



FX Project Planning

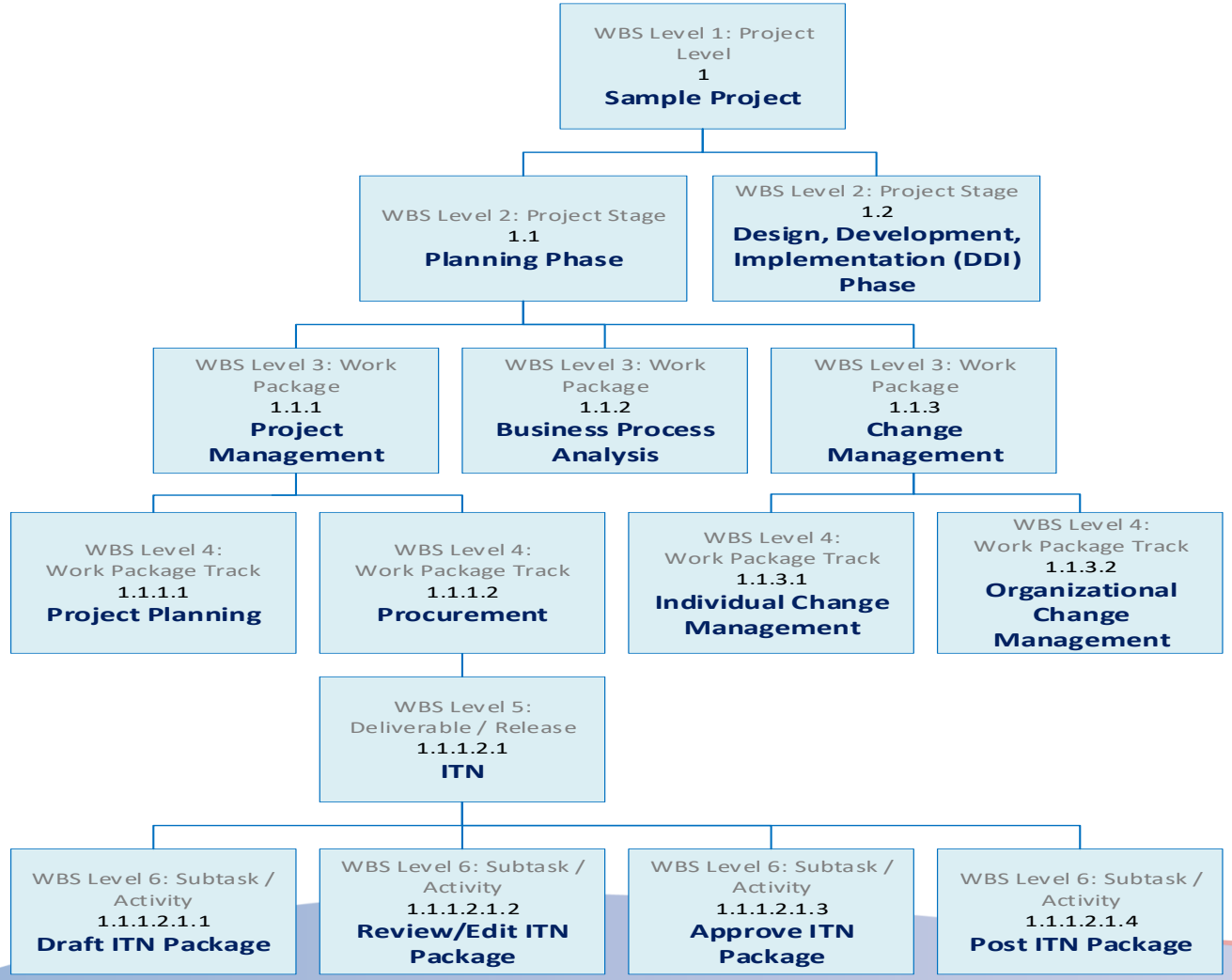
FX Project Planning Stage

- Complete Project Management Plan (PMP)
- Develop Work Breakdown Structure (WBS)
- Develop Schedule
- Identify Risks
- Perform Risk Assessment
- Plan Risk Response
- Estimate Costs and Confirm Budget

Project Management Plan (PMP)

- Plan Scope Management
- Plan Schedule Management
- Plan Resource Management
- Plan CRAIDL Management
- Plan Quality Management
- Plan Document Management
- Plan Communications Management
- Plan Stakeholder Engagement
- Plan Benefits Realization Management
- Plan Cost Management
- Project Acceptance and Close Out

Develop Work Breakdown Structure (WBS)

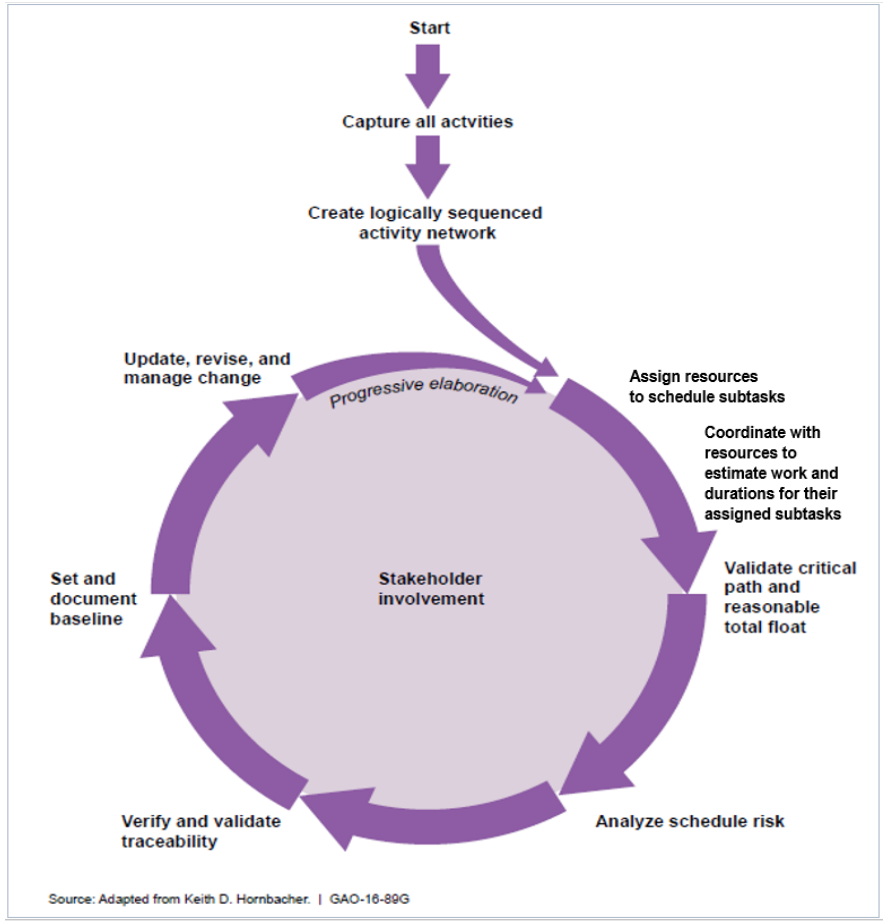


Develop Work Breakdown Structure (WBS)

WBS Level	WBS Level Name	WBS Level Explained
1	▪ Project Level	▪ The Project Summary Task, which represents 100% of the project's scope of work.
1.x	▪ Project Stages	▪ Separates project work into distinct project management process groups, as follows: › Project Management › Initiation › Planning › Execution › Close Out
1.x.x	▪ Work Package	▪ Separates each phase (process group) into individual work packages work, e.g. Business Process Analysis, Development, etc.
1.x.x.x	▪ Work Package Track	▪ Further organizes work of individual work packages into separate tracks or workstreams.
1.x.x.x.x	▪ Deliverable ▪ Release	▪ Deliverable: Identifies the discrete deliverables associated with each workstream track. ▪ Release: Identifies releases within system development.
1.x.x.x.x.x	▪ Subtask / Activity	▪ Identifies the tasks and activities required to plan and develop each deliverable.

Develop Schedule

- When developing the project schedule, use the standard approach depicted in the graphic
- Details on development of the project schedule and setting a baseline can be found in *P-2: FX Project Management Standards*, Section 6.3 *Develop Schedule*, located in the FX Projects Repository, and in the schedule management process definitions



Project Schedule Standards

- FX EPMO will conduct a Quality Check (QC) review of the Project Schedule using the Schedule QC Checklist (located in the FXPR at FX-HUB > Templates > Category: EPMO), which is derived from DCMA's 14-Point Check (along with NASA and GAO guidelines) and covers:
  - Schedule Structure
  - Schedule Format
  - Schedule Mechanics
  - Schedule Resources
  - Subtask Durations
  - Schedule Logic
  - Critical Path

Project Schedule Baseline

- The FX Project Team must meet with key project stakeholders, including Agency sponsors and subject matter experts, to verify estimates for duration, work, and associated resource requirements and to conduct a schedule risk analysis.
- The Project Sponsor authorizes setting the initial schedule baseline based on a walk-through of the schedule and its corresponding Assumptions and Constraints document. Refer to *P-2: FX Project Management Standards* and the various Schedule Management process definitions for details.

FX Project Planning Stage - Risks

- Identify Risks
- Perform Risk Assessment
- Plan Risk Response

Identify Risks

- Risk Title
- Risk Description
- Risk Requestor
- Risk Trigger Description
- Project
- Refer to *P-2: FX Project Management Standards* and the various Risk Management process definitions for details.

Perform Risk Assessment Determine Probability

Probability	Likelihood of Occurring	Numeric Value
Low	Unlikely	1
Medium	Likely	3
High	Very Likely	5

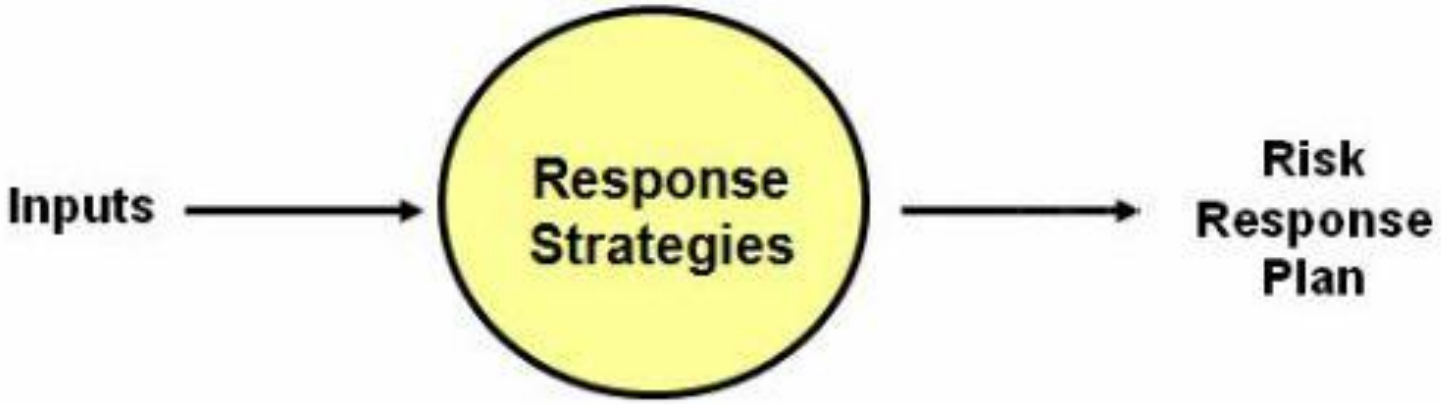
Perform Risk Assessment
Assess Risk Impact

Impact	Dimensions to Consider				
	Cost	Schedule	Scope	Quality	Numeric Value
Low	Impact to cost is below appropriation	No impact to project schedule	Minor clarification to existing scope	Project quality is not in jeopardy	1
Medium	Impact to cost is above appropriation by less than 10%	Schedule impact exists but is not significant	Scope impact exists but is not significant	Impact to quality possible	3
High	Impact to cost is above appropriation by greater than 10%	There is significant impact to Schedule	There is a significant impact to Scope	Impact to quality will occur	5

Perform Risk Assessment
Calculate Risk Exposure Score

Risk Score		Probability		
		1 - Low	3 - Medium	5 - High
Impact	1 - Low	1	3	5
	3 - Medium	3	9	15
	5 - High	5	15	25

Plan Risk Response



Estimate Costs and Confirm Budget

FX Project Execution

FX Project Execution Stage

- Manage Project
  - Quality Management
  - Stakeholder Management
  - Communication Management
  - Team Management
  - Deliverable Management
- Define and Implement Requirements

Manage Project - Quality Management

FX Project teams should plan and document Quality Assurance processes to maintain compliance with the FX Project Management Standards.

Manage Project - Quality Management (cont.)

- Submit deliverables to the Agency Contract Manager (CM) via email
- Agency CM will conduct a deliverable receipt criteria review
- If accepted, Agency CM sends deliverable to the FX Deliverable Review Team Lead(s)
- See the Deliverable Review and Acceptance process definition for details

Manage Project - Stakeholder Management

Manage Project - Communication Management

- Daily Project-Related Communications
- Meeting-Related Communications
- Other Recurring Communications (not Meeting-Related)

  (e.g., FX EPMO Tactical Communications Plan-Ref. P-3: FX Project Management Toolkit)
- Decisions Relating to Project Schedule, Deliverable, or Scope

Manage Project - Communication Management (cont.)

- FX Meeting and Email Standards
  - Schedule Appointment Information
    - Include a Microsoft *Teams* phone number invitation
  - Definition of Formal vs. Informal Meetings
  - Meeting agenda/materials/minutes
  - Who to invite
  - Guidelines for Meeting Attendees
  - Email Standards
- Booking Conference Rooms / Online Meeting Spaces

Manage Project - Communication Management

- Communication Process
- Who to contact if I need anything – FX EPMO Liaison

Manage Project - Team Management

Deliverable Management

What is an artifact?

- Artifacts are both deliverables and work products
  - **Deliverables** are:
    - Artifacts produced for or provided to the Agency that are explicitly identified and categorized as *deliverables* in the Contract, Statement of Work (SOW), or in the deliverables section of a subsequent task order
  - **Work products** are:
    - Project artifacts required for a project team to complete its objectives and fulfill contractual obligations
- **Note:** All artifacts are permanent products of the Agency and are not vendor-owned

Deliverable Management (cont.)

- Comply with all FX Standards and FX Artifact Management Standards (AMS) for all deliverables
- Vendors to develop and submit a Deliverable Expectations Document (DED)
- Refer to the Deliverable Management process definitions

Deliverable Management (cont.)

- The DED is a tool used to record high-level scope of service requirements
- Approved DED –
  - establishes clear expectations and acceptance criteria for the scope and content of a deliverable (i.e., content, format, review team, review/revision timeframes, and acceptance criteria)
  - is the developer's approach to meeting the deliverable requirements and deliverable acceptance criteria for each of the deliverable expectations

Deliverable Management (cont.)

- Vendor shall use the Artifact Naming Standard and version control for all artifacts in accordance with the AMS

  FX-[BUSINESS AREA]-[TEAM (*optional*)**]-[DEL#/ARTIFACT NAME]-[VERSION]**
- Vendor shall utilize the FX Projects Repository for document management of all artifacts
- Deliverable review edits/comments and Vendor remediation shall be made inline using the track changes and comments capabilities
- Vendor shall use the established version control numbering noted in the *Artifact Naming Standard* section of the AMS

Deliverable Management (cont.)

Deliverable Acceptance Criteria

- The deliverable meets the Agency's –
  - requirement for timeliness
  - requirement for completeness
  - requirement for accuracy/conforms to the Agency approved DED

Deliverable Management (cont.)

Using FX Project Templates

- Approved FX templates reside in the FX-HUB under *Templates* in the FX Projects Repository
  - Select a template for use and then *Save As* a copy to your desktop using the artifact naming convention
  - Always use a fresh template for each new artifact
- **Note:** See the FX EPMO for guidance on selecting the appropriate template

FX Project Execution Stage
Define and Implement Requirements

Depending on project size and type, FX projects may include additional technical requirements as identified in the PPA.

Refer to *T-7: The Design and Implementation Management Standards* in the FX Projects Repository for applicable standards and templates.

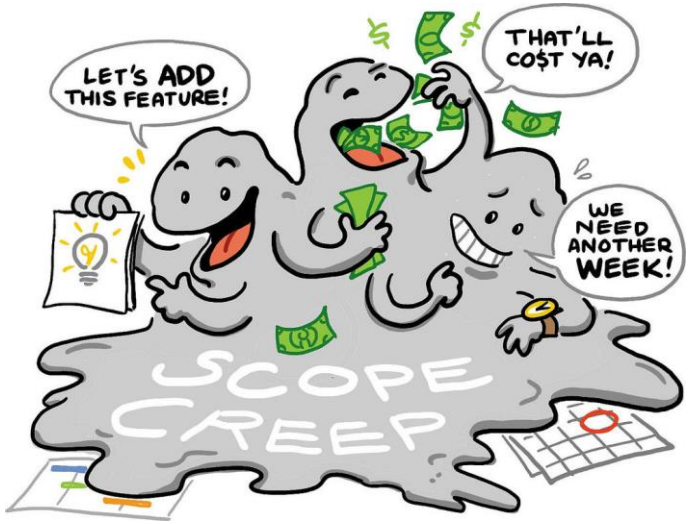
FX Project
Monitoring and Controlling

FX Project Monitoring and Controlling Stage

- Monitoring and Controlling Scope
- Monitoring and Controlling Schedule
- Monitoring and Controlling CRAIDL
- Monitoring and Controlling Performance
- Monitoring and Controlling Outcomes and Benefits
- Monitoring and Controlling Cost
- Refer to *P-2: FX Project Management Standards* and the FX EPMO process definitions.

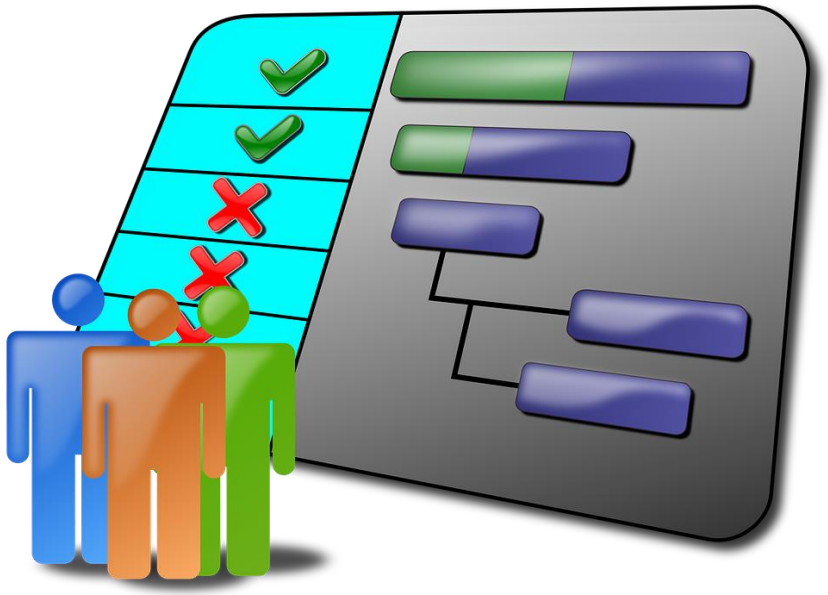
Monitoring and Controlling Scope

FX Project teams control project scope by monitoring the status of the project and managing changes to the scope baseline.

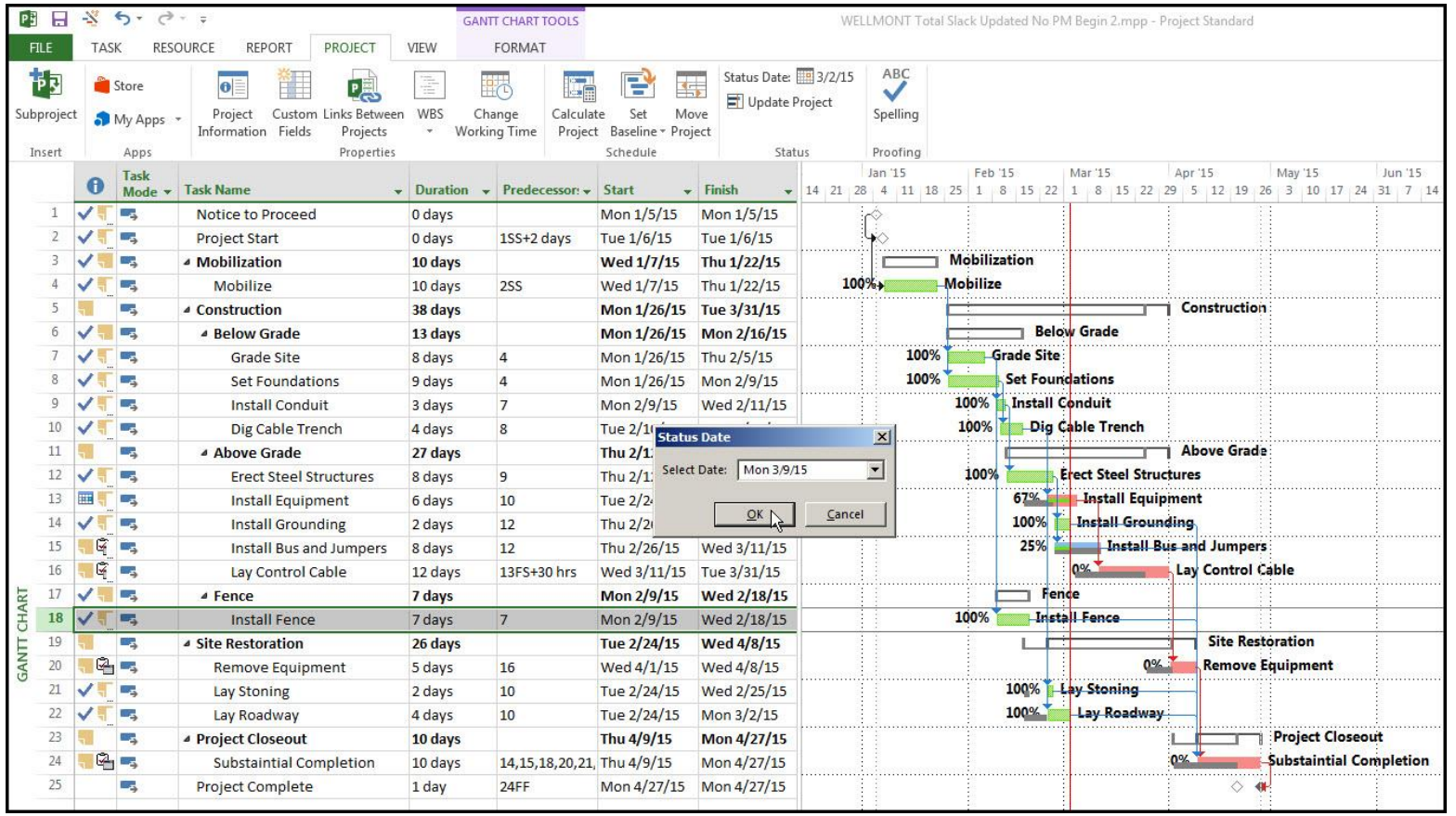


Monitoring and Controlling Schedule

Schedule monitoring and reporting activities must accurately identify and report when forecasted completion dates differ from baseline dates and whether schedule variances will affect downstream work.

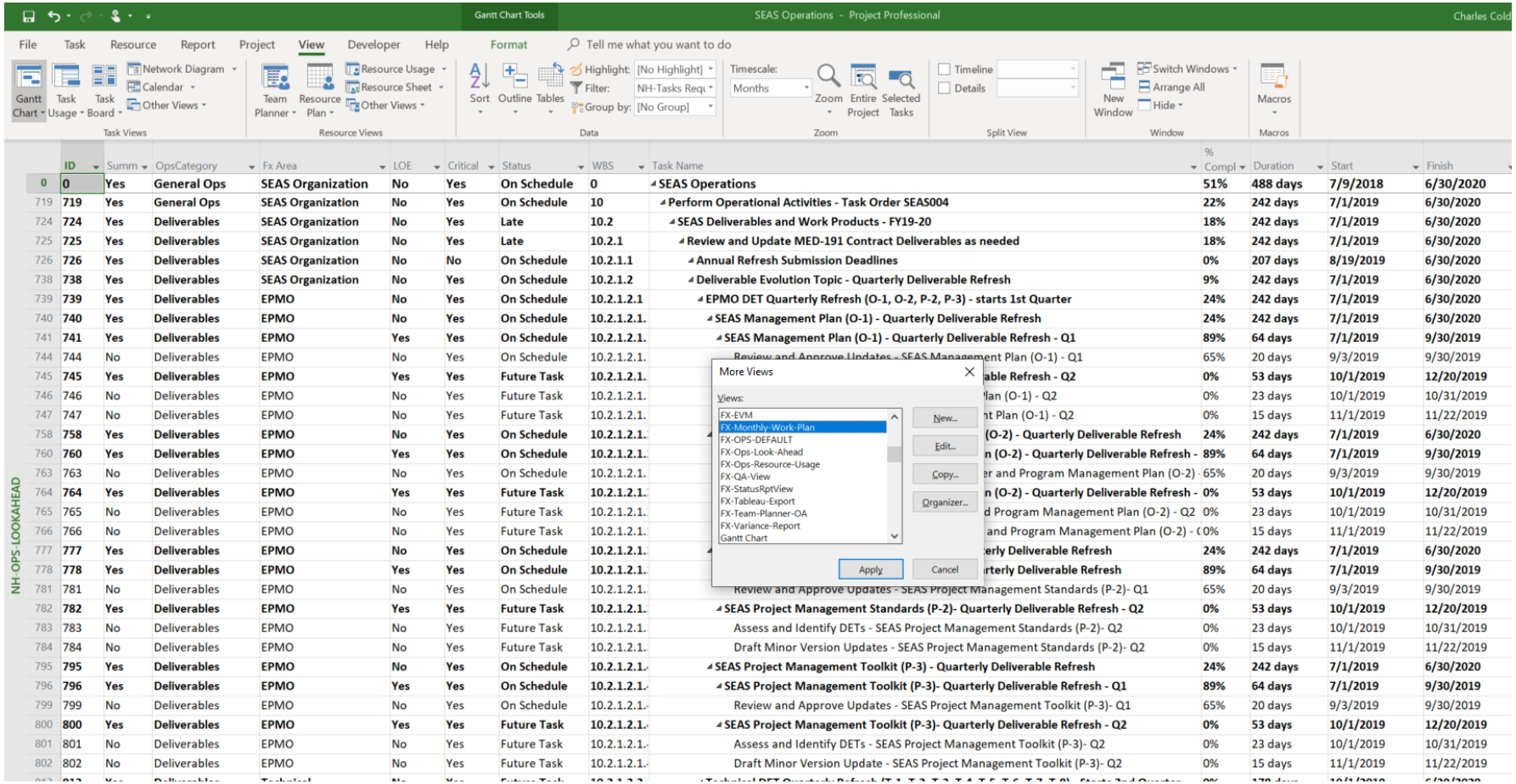


Schedule Update Requirements



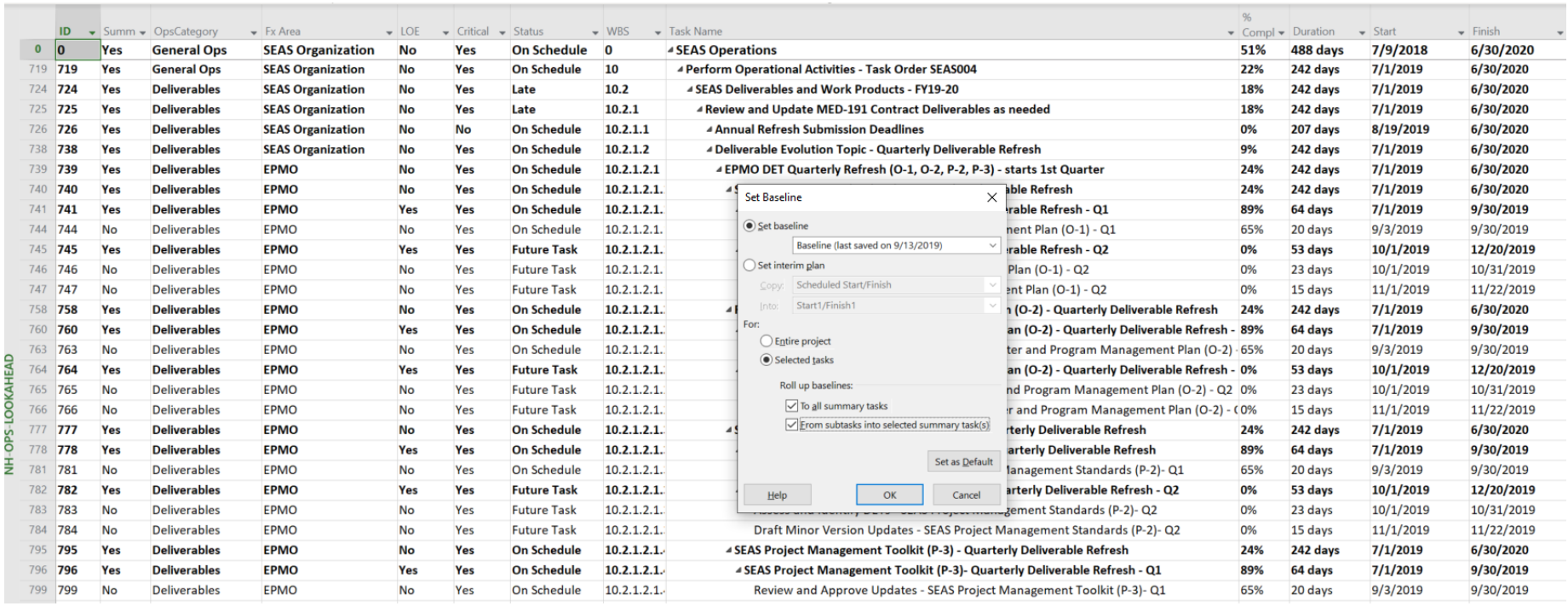
	Task Mode	Task Name	Duration	Predecessors	Start	Finish
1		Notice to Proceed	0 days		Mon 1/5/15	Mon 1/5/15
2		Project Start	0 days	1SS+2 days	Tue 1/6/15	Tue 1/6/15
3		**Mobilization**	**10 days**		**Wed 1/7/15**	**Thu 1/22/15**
4		Mobilize	10 days	2SS	Wed 1/7/15	Thu 1/22/15
5		**Construction**	**38 days**		**Mon 1/26/15**	**Tue 3/31/15**
6		**Below Grade**	**13 days**		**Mon 1/26/15**	**Mon 2/16/15**
7		Grade Site	8 days	4	Mon 1/26/15	Thu 2/5/15
8		Set Foundations	9 days	4	Mon 1/26/15	Mon 2/9/15
9		Install Conduit	3 days	7	Mon 2/9/15	Wed 2/11/15
10		Dig Cable Trench	4 days	8	Tue 2/1	
11		**Above Grade**	**27 days**		**Thu 2/1**	
12		Erect Steel Structures	8 days	9	Thu 2/1	
13		Install Equipment	6 days	10	Tue 2/2	
14		Install Grounding	2 days	12	Thu 2/2	
15		Install Bus and Jumpers	8 days	12	Thu 2/26/15	Wed 3/11/15
16		Lay Control Cable	12 days	13FS+30 hrs	Wed 3/11/15	Tue 3/31/15
17		**Fence**	**7 days**		**Mon 2/9/15**	**Wed 2/18/15**
18		Install Fence	7 days	7	Mon 2/9/15	Wed 2/18/15
19		**Site Restoration**	**26 days**		**Tue 2/24/15**	**Wed 4/8/15**
20		Remove Equipment	5 days	16	Wed 4/1/15	Wed 4/8/15
21		Lay Stoning	2 days	10	Tue 2/24/15	Wed 2/25/15
22		Lay Roadway	4 days	10	Tue 2/24/15	Mon 3/2/15
23		**Project Closeout**	**10 days**		**Thu 4/9/15**	**Mon 4/27/15**
24		Substaintial Completion	10 days	14,15,18,20,21,	Thu 4/9/15	Mon 4/27/15
25		Project Complete	1 day	24FF	Mon 4/27/15	Mon 4/27/15

Monthly Work Plan



	ID	Summ	OpsCategory	Fx Area	LOE	Critical	Status	WBS	Task Name	% Compl	Duration	Start	Finish
0	0	Yes	General Ops	SEAS Organization	No	Yes	On Schedule	0	SEAS Operations	51%	488 days	7/9/2018	6/30/2020
719	719	Yes	General Ops	SEAS Organization	No	Yes	On Schedule	10	Perform Operational Activities - Task Order SEAS004	22%	242 days	7/1/2019	6/30/2020
724	724	Yes	Deliverables	SEAS Organization	No	Yes	Late	10.2	SEAS Deliverables and Work Products - FY19-20	18%	242 days	7/1/2019	6/30/2020
725	725	Yes	Deliverables	SEAS Organization	No	Yes	Late	10.2.1	Review and Update MED-191 Contract Deliverables as needed	18%	242 days	7/1/2019	6/30/2020
726	726	Yes	Deliverables	SEAS Organization	No	No	On Schedule	10.2.1.1	Annual Refresh Submission Deadlines	0%	207 days	8/19/2019	6/30/2020
738	738	Yes	Deliverables	SEAS Organization	No	Yes	On Schedule	10.2.1.2	Deliverable Evolution Topic - Quarterly Deliverable Refresh	9%	242 days	7/1/2019	6/30/2020
739	739	Yes	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1	EPMO DET Quarterly Refresh (O-1, O-2, P-2, P-3) - starts 1st Quarter	24%	242 days	7/1/2019	6/30/2020
740	740	Yes	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.	SEAS Management Plan (O-1) - Quarterly Deliverable Refresh	24%	242 days	7/1/2019	6/30/2020
741	741	Yes	Deliverables	EPMO	Yes	Yes	On Schedule	10.2.1.2.1.	SEAS Management Plan (O-1) - Quarterly Deliverable Refresh - Q1	89%	64 days	7/1/2019	9/30/2019
744	744	No	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.	Review and Approve Updates - SEAS Management Plan (O-1) - Q1	65%	20 days	9/3/2019	9/30/2019
745	745	Yes	Deliverables	EPMO	Yes	Yes	Future Task	10.2.1.2.1.	able Refresh - Q2	0%	53 days	10/1/2019	12/20/2019
746	746	No	Deliverables	EPMO	No	Yes	Future Task	10.2.1.2.1.	lan (O-1) - Q2	0%	23 days	10/1/2019	10/31/2019
747	747	No	Deliverables	EPMO	No	Yes	Future Task	10.2.1.2.1.	t Plan (O-1) - Q2	0%	15 days	11/1/2019	11/22/2019
758	758	Yes	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.	(O-2) - Quarterly Deliverable Refresh	24%	242 days	7/1/2019	6/30/2020
760	760	Yes	Deliverables	EPMO	Yes	Yes	On Schedule	10.2.1.2.1.	n (O-2) - Quarterly Deliverable Refresh -	89%	64 days	7/1/2019	9/30/2019
763	763	No	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.	er and Program Management Plan (O-2) -	65%	20 days	9/3/2019	9/30/2019
764	764	Yes	Deliverables	EPMO	Yes	Yes	Future Task	10.2.1.2.1.	n (O-2) - Quarterly Deliverable Refresh -	0%	53 days	10/1/2019	12/20/2019
765	765	No	Deliverables	EPMO	No	Yes	Future Task	10.2.1.2.1.	d Program Management Plan (O-2) - Q2	0%	23 days	10/1/2019	10/31/2019
766	766	No	Deliverables	EPMO	No	Yes	Future Task	10.2.1.2.1.	and Program Management Plan (O-2) - (	0%	15 days	11/1/2019	11/22/2019
777	777	Yes	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.	erly Deliverable Refresh	24%	242 days	7/1/2019	6/30/2020
778	778	Yes	Deliverables	EPMO	Yes	Yes	On Schedule	10.2.1.2.1.	rterly Deliverable Refresh	89%	64 days	7/1/2019	9/30/2019
781	781	No	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.	Review and Approve Updates - SEAS Project Management Standards (P-2)- Q1	65%	20 days	9/3/2019	9/30/2019
782	782	Yes	Deliverables	EPMO	Yes	Yes	Future Task	10.2.1.2.1.	SEAS Project Management Standards (P-2)- Quarterly Deliverable Refresh - Q2	0%	53 days	10/1/2019	12/20/2019
783	783	No	Deliverables	EPMO	No	Yes	Future Task	10.2.1.2.1.	Assess and Identify DETs - SEAS Project Management Standards (P-2)- Q2	0%	23 days	10/1/2019	10/31/2019
784	784	No	Deliverables	EPMO	No	Yes	Future Task	10.2.1.2.1.	Draft Minor Version Updates - SEAS Project Management Standards (P-2)- Q2	0%	15 days	11/1/2019	11/22/2019
795	795	Yes	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.	SEAS Project Management Toolkit (P-3) - Quarterly Deliverable Refresh	24%	242 days	7/1/2019	6/30/2020
796	796	Yes	Deliverables	EPMO	Yes	Yes	On Schedule	10.2.1.2.1.	SEAS Project Management Toolkit (P-3)- Quarterly Deliverable Refresh - Q1	89%	64 days	7/1/2019	9/30/2019
799	799	No	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.	Review and Approve Updates - SEAS Project Management Toolkit (P-3)- Q1	65%	20 days	9/3/2019	9/30/2019
800	800	Yes	Deliverables	EPMO	Yes	Yes	Future Task	10.2.1.2.1.	SEAS Project Management Toolkit (P-3)- Quarterly Deliverable Refresh - Q2	0%	53 days	10/1/2019	12/20/2019
801	801	No	Deliverables	EPMO	No	Yes	Future Task	10.2.1.2.1.	Assess and Identify DETs - SEAS Project Management Toolkit (P-3)- Q2	0%	23 days	10/1/2019	10/31/2019
802	802	No	Deliverables	EPMO	No	Yes	Future Task	10.2.1.2.1.	Draft Minor Version Update - SEAS Project Management Toolkit (P-3)- Q2	0%	15 days	11/1/2019	11/22/2019

Schedule Revisions Change Control



NH-OPS-LOOKAHEAD

	ID	Summ	OpsCategory	Fx Area	LOE	Critical	Status	WBS	Task Name	% Compl	Duration	Start	Finish
0	0	Yes	General Ops	SEAS Organization	No	Yes	On Schedule	0	SEAS Operations	51%	488 days	7/9/2018	6/30/2020
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744	744	No	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.	...ent Plan (O-1) - Q1	65%	20 days	9/3/2019	9/30/2019
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746	746	No	Deliverables	EPMO	No	Yes	Future Task	10.2.1.2.1.	...Plan (O-1) - Q2	0%	23 days	10/1/2019	10/31/2019
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758	758	Yes	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.	...(O-2) - Quarterly Deliverable Refresh	24%	242 days	7/1/2019	6/30/2020
760	760	Yes	Deliverables	EPMO	Yes	Yes	On Schedule	10.2.1.2.1.	...an (O-2) - Quarterly Deliverable Refresh -	89%	64 days	7/1/2019	9/30/2019
763	763	No	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.	...ter and Program Management Plan (O-2) -	65%	20 days	9/3/2019	9/30/2019
764	764	Yes	Deliverables	EPMO	Yes	Yes	Future Task	10.2.1.2.1.	...an (O-2) - Quarterly Deliverable Refresh -	0%	53 days	10/1/2019	12/20/2019
765	765	No	Deliverables	EPMO	No	Yes	Future Task	10.2.1.2.1.	...nd Program Management Plan (O-2) - Q2	0%	23 days	10/1/2019	10/31/2019
766	766	No	Deliverables	EPMO	No	Yes	Future Task	10.2.1.2.1.	...r and Program Management Plan (O-2) - (	0%	15 days	11/1/2019	11/22/2019
777	777	Yes	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.	...rterly Deliverable Refresh	24%	242 days	7/1/2019	6/30/2020
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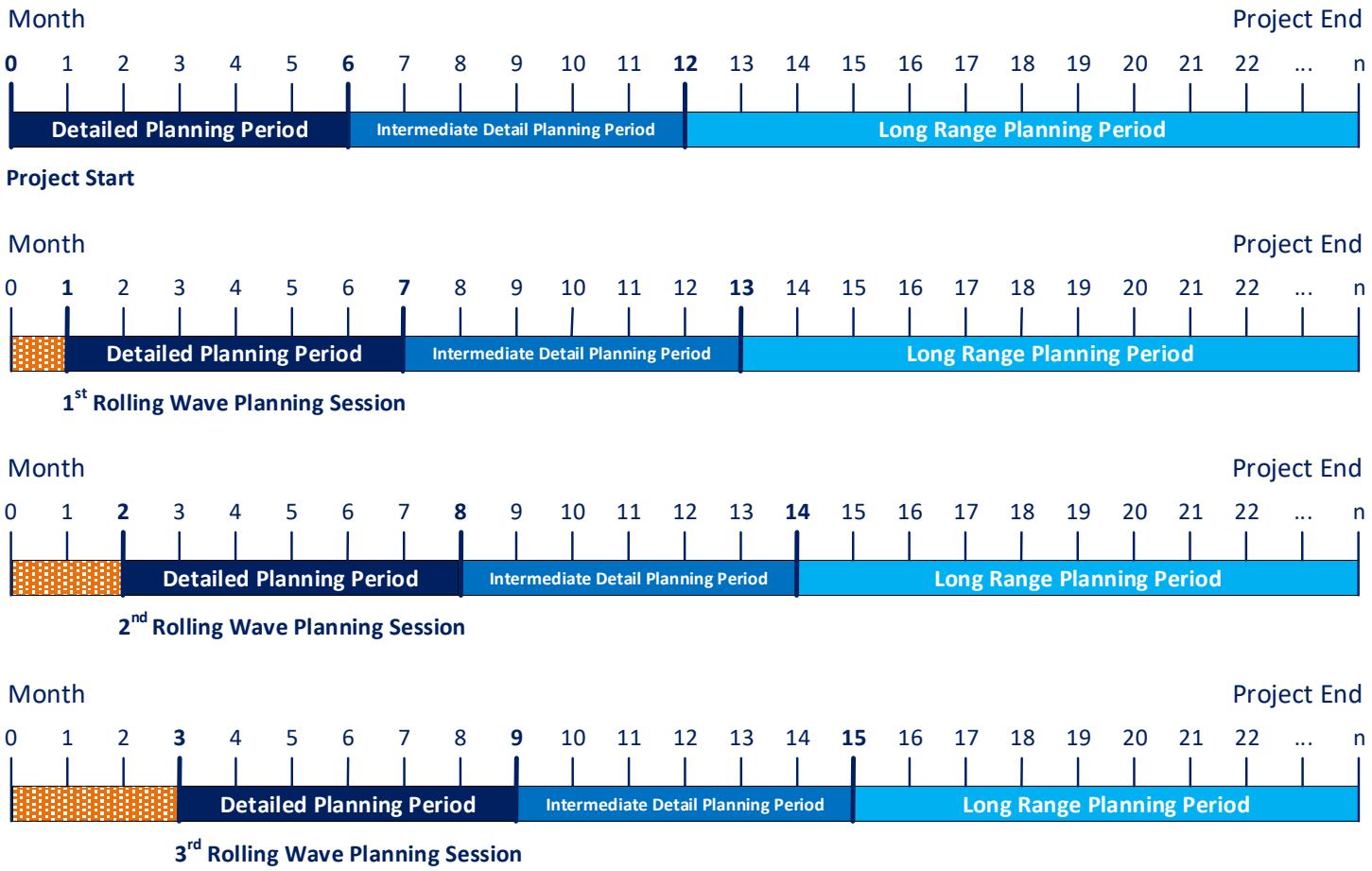
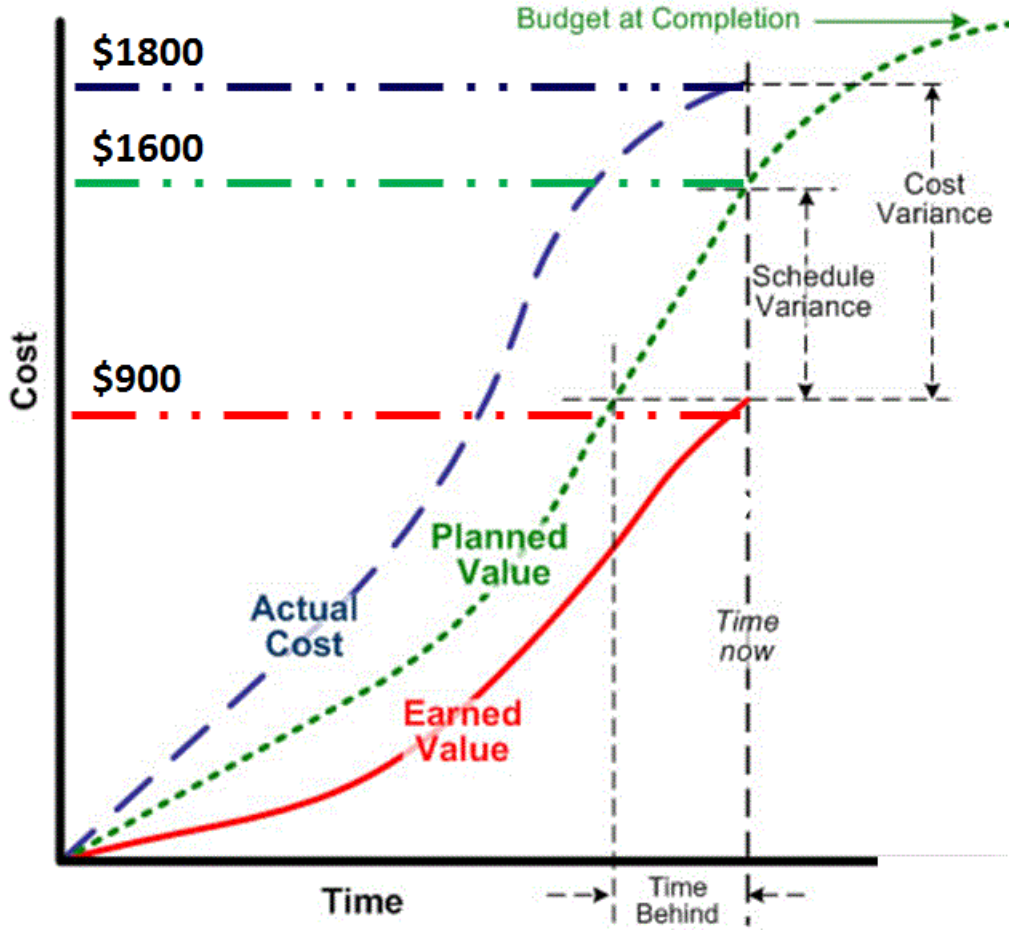
795	795	Yes	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.	SEAS Project Management Toolkit (P-3) - Quarterly Deliverable Refresh	24%	242 days	7/1/2019	6/30/2020
796	796	Yes	Deliverables	EPMO	Yes	Yes	On Schedule	10.2.1.2.1.	SEAS Project Management Toolkit (P-3)- Quarterly Deliverable Refresh - Q1	89%	64 days	7/1/2019	9/30/2019
799	799	No	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.	Review and Approve Updates - SEAS Project Management Toolkit (P-3)- Q1	65%	20 days	9/3/2019	9/30/2019

Rolling Wave Planning

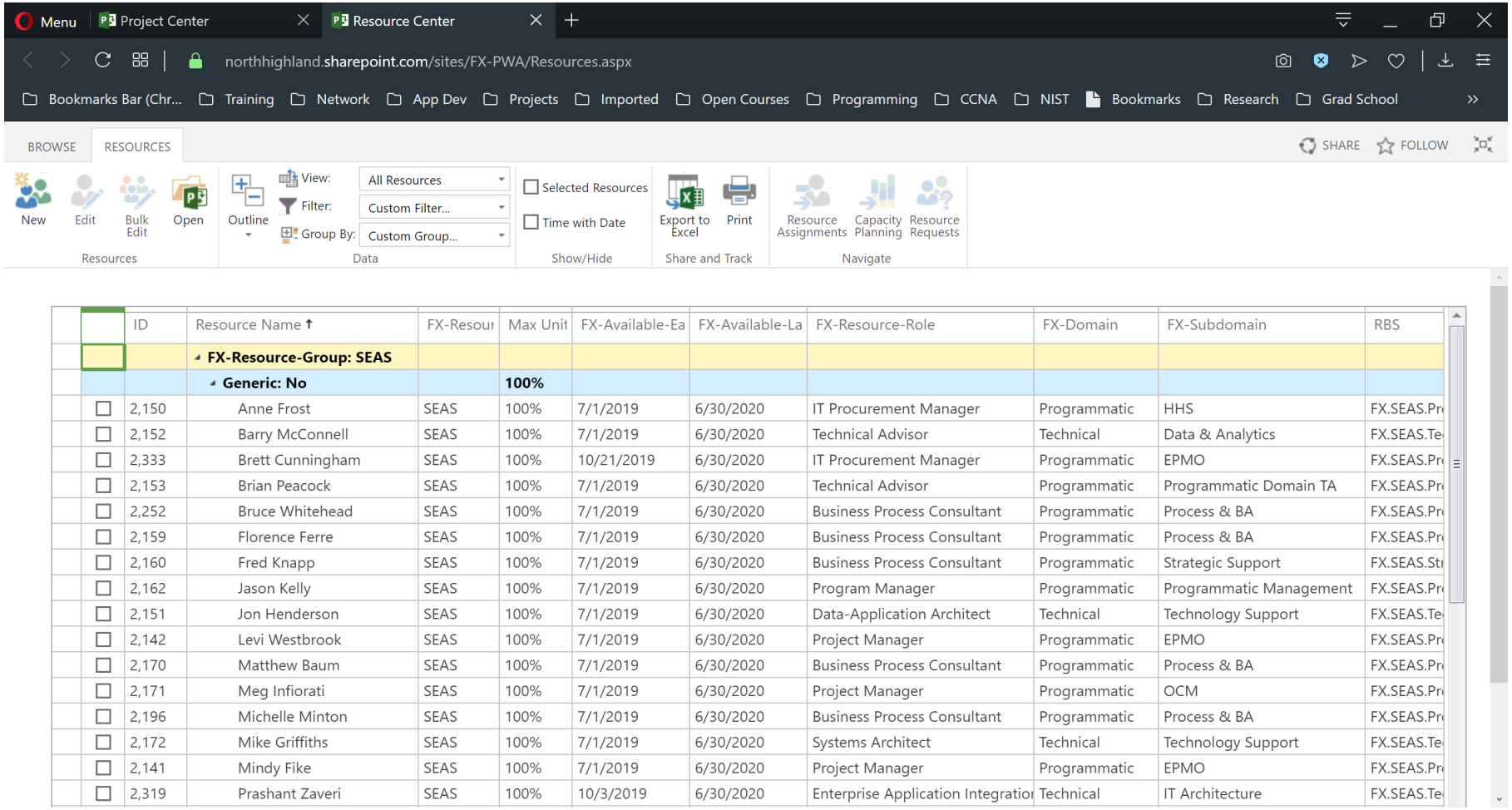


Schedule Analysis and Schedule Variance



Mitigating Schedule Delays

Enterprise Resource Pool

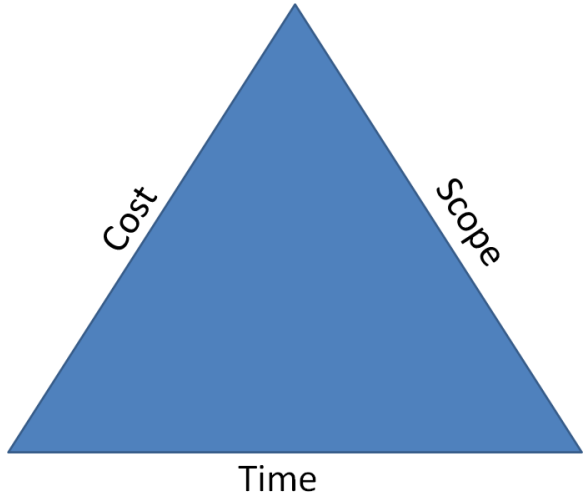


	ID	Resource Name	FX-Resour	Max Unit	FX-Available-Ea	FX-Available-La	FX-Resource-Role	FX-Domain	FX-Subdomain	RBS
		FX-Resource-Group: SEAS								
		Generic: No		**100%**						
☐	2,150	Anne Frost	SEAS	100%	7/1/2019	6/30/2020	IT Procurement Manager	Programmatic	HHS	FX.SEAS.Pr
☐	2,152	Barry McConnell	SEAS	100%	7/1/2019	6/30/2020	Technical Advisor	Technical	Data & Analytics	FX.SEAS.Te
☐	2,333	Brett Cunningham	SEAS	100%	10/21/2019	6/30/2020	IT Procurement Manager	Programmatic	EPMO	FX.SEAS.Pr
☐	2,153	Brian Peacock	SEAS	100%	7/1/2019	6/30/2020	Technical Advisor	Programmatic	Programmatic Domain TA	FX.SEAS.Pr
☐	2,252	Bruce Whitehead	SEAS	100%	7/1/2019	6/30/2020	Business Process Consultant	Programmatic	Process & BA	FX.SEAS.Pr
☐	2,159	Florence Ferre	SEAS	100%	7/1/2019	6/30/2020	Business Process Consultant	Programmatic	Process & BA	FX.SEAS.Pr
☐	2,160	Fred Knapp	SEAS	100%	7/1/2019	6/30/2020	Business Process Consultant	Programmatic	Strategic Support	FX.SEAS.St
☐	2,162	Jason Kelly	SEAS	100%	7/1/2019	6/30/2020	Program Manager	Programmatic	Programmatic Management	FX.SEAS.Pr
☐	2,151	Jon Henderson	SEAS	100%	7/1/2019	6/30/2020	Data-Application Architect	Technical	Technology Support	FX.SEAS.Te
☐	2,142	Levi Westbrook	SEAS	100%	7/1/2019	6/30/2020	Project Manager	Programmatic	EPMO	FX.SEAS.Pr
☐	2,170	Matthew Baum	SEAS	100%	7/1/2019	6/30/2020	Business Process Consultant	Programmatic	Process & BA	FX.SEAS.Pr
☐	2,171	Meg Infiorati	SEAS	100%	7/1/2019	6/30/2020	Project Manager	Programmatic	OCM	FX.SEAS.Pr
☐	2,196	Michelle Minton	SEAS	100%	7/1/2019	6/30/2020	Business Process Consultant	Programmatic	Process & BA	FX.SEAS.Pr
☐	2,172	Mike Griffiths	SEAS	100%	7/1/2019	6/30/2020	Systems Architect	Technical	Technology Support	FX.SEAS.Te
☐	2,141	Mindy Fike	SEAS	100%	7/1/2019	6/30/2020	Project Manager	Programmatic	EPMO	FX.SEAS.Pr
☐	2,319	Prashant Zaveri	SEAS	100%	10/3/2019	6/30/2020	Enterprise Application Integratio	Technical	IT Architecture	FX.SEAS.Te

Monitoring and Controlling CRAIDL

- C – Change
- R – Risk
- A – Action Items
- I – Issues
- D – Decisions
- L – Lessons Learned

Monitoring and Controlling Change



Monitoring and Controlling Change
Impact Score Methodology

Impact	Dimensions of Consideration				Qualitative Score Assigned
	Cost	Schedule	Scope	Quality	
Low	Impact to cost is below 4% of appropriation	No or little impact to project schedule	Minor clarification to existing scope	Project quality is not affected	1
Medium	Impact to cost is above 4% but below 10% of appropriation	Schedule impact is possible	Scope change is noticeable, but not deemed significant	Impact to quality possible	3
High	Impact to cost is above 10% of appropriation	Schedule and deliverable due dates will be impacted; determination of the schedule	Scope change or scope determination is deemed significant	Impact to quality is very likely	5
Total Impact Score Weight	**40%**	**20%**	**20%**	**20%**	= Final Score

Final Impact Score	**≤ 2**	**>2 to < 4**	**≥ 4**
	Part of general project management for FX EPMO or Project Team	**Route to FX Governance for Recommendation**	**Route up to FX Governance for Recommendation**

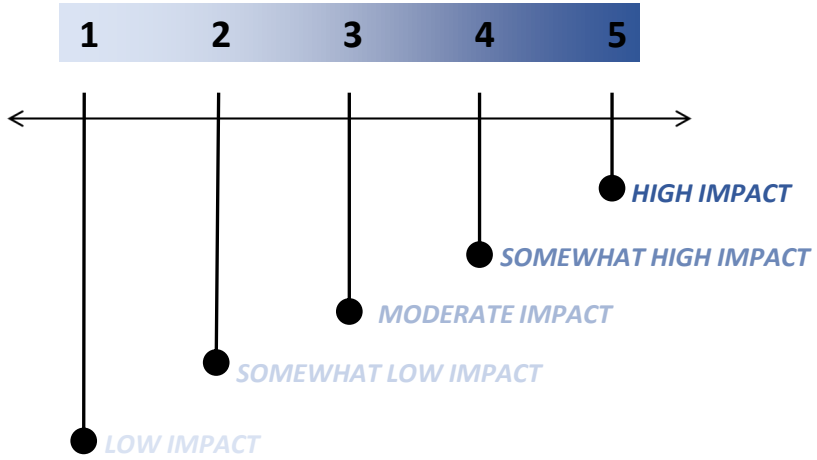
Monitoring and Controlling Change
Decision Impact Score Summary

How will impact for each decision-need be scored to inform routing to FX Governance?

FX will assess decision or recommendation needs across four relevant criteria:

Cost
Schedule
Scope
Quality

Legend for Numerical Scores



Monitoring and Controlling Risks

- Continually perform risk identification, risk response planning, and risk monitoring
- Track and report of risks with high exposure (15+) or with imminent trigger dates (less than 8 weeks out)
- Risk Owners are responsible for providing updates to the FX Project Manager
- High exposure risks are reported to DMS via Monthly Status Report

Monitoring and Controlling Action Items

- Action Items are unplanned work
- Needed to:
  - Resolve issues
  - Facilitate decision-making
  - Assess change
  - Facilitate work in the schedule
- Regular review and updates are expected
- Action Item Owners will provide updates at FX Project status meetings. The Action Item Owner is the person listed in the Assigned To field.

Monitoring and Controlling Issues

- Log identified issue
- Root Cause Analysis
- Identify resolution strategy
- Assign an owner to reach a resolution
- Continuously monitor to drive resolution
- Follow the Escalation Process defined in the PMP

Monitoring and Controlling Decisions

- Clarify project parameters within the bounds of contracted work or to outline parameters for a potential change request
- Either logged when a decision is needed or after decision made
- FX Project Team will monitor open requests weekly

Monitoring and Controlling Lessons Learned

- Stop-Start-Continue
  - Stop actions that yield negative results
  - Start actions expected to yield positive results
  - Continue actions that yield positive results
- Captured throughout the project; at a minimum at the end of a project stage

Monitoring and Controlling Performance

Monitoring and Controlling Outcomes and Benefits

Monitoring and Controlling Costs

FX Project
Close Out

FX Project Close Out Stage

The purpose of the Project Close Out stage is to formally finalize all project activities.

- **Lessons Learned Summary** – The FX Project Manager will conduct a Lessons Learned review session and complete the Lessons Learned summary of the Project Close Out Report.
- **Disposition of Project Documentation** – At this stage of the FX Project, the FX Project Manager works with the FX EPMO to review project documents for completeness and archiving according to the document management plan.
- **Project Close Out Summary** – Finally, the project manager documents and submits the sponsor-approved Project Close Out Report to the FX EPMO, along with a Compliance Assessment that checks project artifacts against project management standards set forth in the DMS IT Project Management Standards, Rule 60GG-1, Florida Administrative Code.

FX Project
Roles/Responsibilities

FX Roles/Responsibilities: Agency

- Agency Responsibilities
  - Review FX Program Dashboard (Weekly) as part of FX Governance
  - Review and approve FX Monthly Status Report prior to sending to DMS
  - Attend Project Status Meetings and provide input and updates on project status, CRAIDL items, and general discussion
  - Identify CRAIDL items, provide input on the management of CRAIDL items (Risk Response, Issue Resolutions, etc.), and provide updates when assigned as a Named Owner
  - For Agency-owned meetings, provide agendas and minutes
  - Attend the FX Schedule Review Meetings
  - Attend the FX Program CRAIDL Meetings

FX Roles/Responsibilities: SEAS

- SEAS Responsibilities
  - Develop and submit FX Program Dashboard (Weekly)
  - Develop and submit FX Monthly Status Report
  - Schedule and facilitate FX EPMO Meeting
  - Schedule and facilitate Project Status Meetings
  - Schedule and facilitate Project Schedule Review Meetings
  - Schedule and facilitate Project CRAIDL Meetings
  - Input, monitor, and control CRAIDL Logs and project- and program-related CRAIDL Items
  - For SEAS-owned meetings, provide agendas and minutes
  - Represent assigned project(s) in the FX Schedule Review Meetings
  - Represent assigned project(s) in the FX Program CRAIDL Meetings
  - Manage overall program execution

FX Roles/Responsibilities: FX Vendor

- FX Vendor Responsibilities
  - Provide project status input to populate the FX Program Dashboard (Weekly) and Monthly Project Status Report
  - Attend Weekly Status Meetings and provide input and updates on project status, CRAIDL items, and general discussion
  - Attend Weekly Schedule Review Meetings and provide updates on assigned tasks
  - Identify CRAIDL items, provide input on the management of CRAIDL items (Risk Response, Issue Resolutions, etc.), and provide updates when assigned as a Named Owner
  - For FX Vendor-owned meetings, provide agendas and minutes
  - Manage assigned activities and team members

Q & A

Questions?