AHCA Florida Health Care Connections (FX)

Attachment C - FX Hybrid Agile Framework

Version: 600

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Author: SEAS Vendor

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Revision History

DATE	VERSION	DESCRIPTION	AUTHOR
12/13/2022	401	Attachment C - FX Hybrid Agile Framework Development Draft Version per DET #545 to add the hybrid Agile approach	FX EPMO Team
2/15/2023	402	Attachment C - FX Hybrid Agile Framework remediation from Agency review	FX EPMO Team
3/16/2023	403	Attachment C - FX Hybrid Agile Framework remediation from Agency review	FX EPMO Team
3/28/2023	500	Attachment C - FX Hybrid Agile Framework approved final	Carol Williams
11/29/2023	501	Attachment C - FX Hybrid Agile Framework refresh updates made as follows: ▪ Updated FX EPMO to reflect FX EPgMO throughout per DET #599	FX EPgMO Team
12/13/2023	502	Attachment C - FX Hybrid Agile Framework no comments to address from Agency review	Carol Williams
12/14/2023	600	Attachment C - FX Hybrid Agile Framework approved final	Carol Williams

Modifications to the approved baseline version (100) of this artifact must be made in accordance with the FX Artifact Management Standards.

Quality Review History

DATE	REVIEWER	COMMENTS
11/4/2022	Steve Beckham	Conducted peer review
11/23/2022	Carol Williams	Conducted quality review
2/10/2023	Carol Williams	Conducted quality review
3/16/2023	Carol Williams	Conducted quality review
11/29/2023	Carol Williams	Conducted quality review

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SECTION 1   INTRODUCTION

1.1 BACKGROUND

The Florida Agency for Health Care Administration (AHCA or Agency) is adapting to the changing landscape of healthcare administration and increased use of the Centers for Medicare and Medicaid Services (CMS) Medicaid Information Technology Architecture (MITA) to improve the administration and operation of the Florida Medicaid Enterprise. The current Florida Medicaid Enterprise is complex; it includes services, business processes, data management and processes, technical processes within the Agency, and interconnections and touchpoints with systems necessary for administration of the Florida Medicaid program that reside outside the Agency. The future of the Florida Medicaid Enterprise integration is to allow the Agency to secure services that can interoperate and communicate without relying on a common platform or technology.

The Florida Medicaid Management Information System (FMMIS) has historically been the central system within the Florida Medicaid Enterprise; functioning as the single, integrated system for claims processing and information retrieval. As the Medicaid program has grown more complex, the systems needed to support the Florida Medicaid Enterprise have grown in number and complexity.

The Medicaid Enterprise System (MES) Procurement Project was re-named Florida Health Care Connections (FX) in the summer of 2018. FX is a multi-year transformation to modernize the current Medicaid technology using a modular approach, while simultaneously improving overall Agency functionality and building better connections to other data sources and programs.

1.2 PURPOSE

This document outlines a Hybrid Agile framework that can be employed on FX projects.

1.3 SCOPE STATEMENT

The scope of this material is the definition of and basic requirements for a basic Hybrid Agile approach approved for use on FX projects, where the FX Enterprise Program Management Office (EPgMO) and FX leadership determine that this approach best meets the needs of the FX Program.

1.4 GOALS AND OBJECTIVES

The goals and objectives for this work product are:

Goal #1 – Define a framework for use of a Hybrid Agile approach for FX projects that preserves the ability to effectively manage and report on progress toward completion of the work defined for the project. This goal will be accomplished by achieving the following objectives:

Objective #1 – Develop a flexible Hybrid Agile approach that supports flexibility and agility while maintaining control of work.

Objective #2 – Produce development results more quickly while maintaining quality of deliverables.

Objective #3 – Create an environment in which development teams can increase efficiency by managing workloads with an Agile structure.

1.5 REFERENCED DOCUMENTS AND RESOURCES

The following artifacts were used as input to the development of the *FX Hybrid Agile Framework*:

- P-3: FX Project Management Toolkit
- S-1: FX Governance Plan
- Project Management Institute Agile Practice Guide
- Accelerating Outcomes with a Hybrid Approach within a Waterfall Environment - Project Management Institute
- Understanding Epics, Features, and Stories – ScrumDistrict.com

SECTION 2   HYBRID AGILE

This section defines the approach for using Scrum as the preferred Agile framework in a Waterfall environment referred to in this document as *Hybrid Agile*. Other Agile frameworks could be approved by the Agency in lieu of Scrum but specifics on these frameworks are not part of this document. This approach allows project teams the flexibility to execute in the most efficient and effective manner, while still providing the FX Program stakeholders information on status, risk, and issue management in the traditional manner. Hybrid Agile is not a substitute for thorough planning and effective project management. Teams employing a Hybrid Agile approach must have experienced Agile resources in roles such as Scrum Master and Product Owner.

Exhibit 2-1: FX Hybrid Agile Framework below shows how Agile fits into the FX Project Life Cycle.
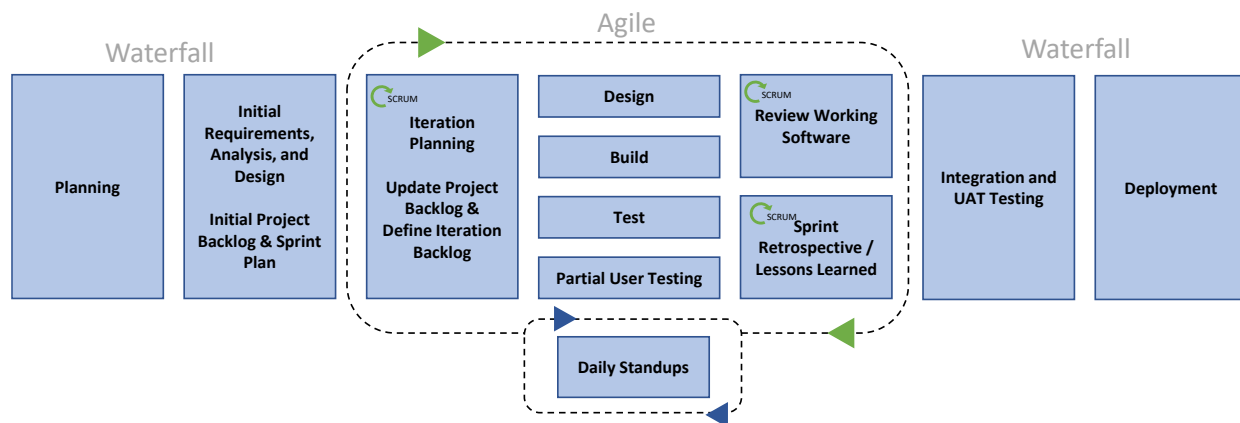

Exhibit 2-1: FX Hybrid Agile Framework

The *FX Hybrid Agile Framework* consists of elements from both traditional Waterfall and Agile approaches. Planning and initial requirements and design are all executed using the more traditional Waterfall approach. Agile approaches and ceremonies are used during detailed design, build, and test (at the user story level), with partial user testing of user stories occurring within sprints. Agile activities, such as daily standups, are employed during development, and ceremonies such as retrospectives are used to gather lessons learned to help improve the process. Integration and full user acceptance testing phases utilize traditional Waterfall approaches.

Initial requirements and design must be complete and approved prior to the development phases in which the Hybrid Agile approach will be employed. If the work is of a complex nature and requires iterative design approaches, the Agency and the vendor must agree on the method used for iterative approval of the design materials. At a minimum, sign-off from the Project Sponsor and/or Product Owner (depending on the roles defined for the project) must be obtained at the *Feature* design level. Entry into the Agile component of the project requires an approved Sprint Plan.

The framework employs Epics to organize larger bodies of work that may span across sprints. Epics are defined in the same manner as User Stories, and must identify the type of user, the goal, and the reason the functionality or output is needed. See **Exhibit 2-2: Relationship of Epics, Features, and Sprints** below for a visual representation of how these elements fit together.
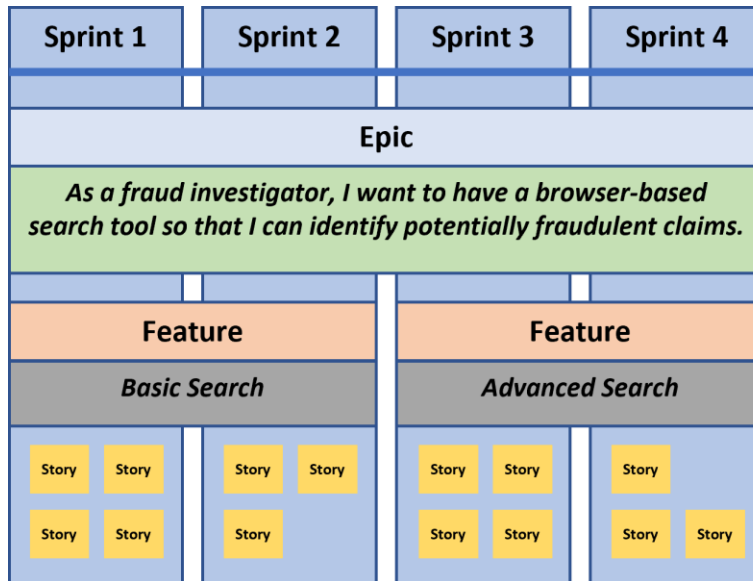

Exhibit 2-2: Relationship of Epics, Features, and Sprints

Epics are managed with smaller components identified as Features. There can be multiple features within an Epic, but Features should only span one release (which may be comprised of one or more sprints). A release is comprised of one or more complete Features deployed at a defined point in time.

Features are broken into smaller increments of work or user stories. While Features can span multiple sprints within a release, user stories must be delivered within a sprint. While user stories can move between sprints within a Feature, as sprint planning is refined, Features are to be moved from one release to another, or if scope within a Feature must be modified, a Project Change Request (PCR) is required.

For project teams leveraging Hybrid Agile, the schedule must contain high-level tasks that have initial duration and work estimates with resource assignments as best as can be known at the time the schedule is developed. Changes made through Hybrid Agile cannot exceed the initial estimates or cost without an approved PCR. Refer to Section 8.3.1 of *P-2: FX Project Management Standards* for details on monitoring and controlling changes. Hybrid Agile must follow the requirements below:

- An experienced Scrum Master is required for each project employing this approach.
- An Agency Product Owner must be identified (this may be the Project Sponsor or Project Lead, but it must be someone with the authority to make decisions).

- Team members must be identified prior to the first sprint.
- User Stories are to be defined during Sprint 0 so the Product Backlog can be developed.
- Product Backlog must be refined at least every sprint. A new Feature or Epic requires an approved PCR before the Feature or Epic is added to the Product Backlog. Removal of a Feature or Epic requires an approved PCR before it is removed from the product backlog. Refer to Section 8.3.1 of *P-2: FX Project Management Standards* for details on monitoring and controlling changes. In all cases, changes that remove or add requirements/scope require a PCR.
- If a Feature milestone will not be met, and the work needs to be moved to a new release, a PCR is required.
- Product Backlog must be available to all team members in Jira and the FX EPgMO at all times, along with the current Sprint Backlog and Burndown Chart.
- Capacity of each team member must be accounted for in each sprint.
- A sprint can be no shorter than two weeks (10 business days) and no longer than three weeks (15 business days) in length.
- A sprint planning session must be conducted at the beginning of every sprint, facilitated by the Scrum Master, and include the team members, Product Owner, Project Sponsor, and FX EPgMO.
- Daily standups will be attended by the scrum team and facilitated by the Scrum Master.
- A sprint review (demo) will be performed at the end of the sprint, facilitated by the Scrum Master, and attended by the Product Owner, scrum team and any interested stakeholders.
- A sprint retrospective session must be conducted at the end of every sprint and facilitated by the Scrum Master. Only the team members are required to attend the session however, lessons learned that impact the FX Program or another project must be logged in the project or program's lessons learned log.
- A baselined schedule that follows FX Schedule Management standards (as described in *P-2: FX Project Management Standards*) with all sprints listed, with milestones for completion of Features. The sprint must include high-level summary tasks of the items to be completed during each sprint. The determination of how to organize Releases, Features, and Sprints within an individual project will be based on the complexity of the project, and the decision made in the Sprint Plan.
- Management of Epics, Features, and user stories will be accomplished in Jira.
- All existing FX EPgMO standards and process definitions are required (i.e., Change, Risk, Action Item, Issue, Decision, Lessons Learned (CRAIDL), Baselined Microsoft Project Schedule, etc.).
- FX EPgMO weekly and monthly status reporting will remain in place as the reporting standard, however Velocity/Burn-Up/Burn-Down charts may also be requested in addition to FX EPgMO status reporting by the Project Sponsor, project team, or FX EPgMO.

- If a user story is not completed during the sprint, it may be extended to another sprint within the same release, however, if this causes the release to be delayed or if the overarching Epic is to be moved within the plan, a PCR is required.

Outputs from each sprint planning session must include:

- Sprints must be updated with User Stories at the end of each sprint planning session. The subtasks, with resources assigned, may be in the schedule or in a tool such as Jira so Velocity/Burn-Up/Burn-Down charts can be produced if requested.
- Resources (named individuals replacing any generic roles identified in high-level plans) must be assigned to each subtask.
- A PCR is required for addition of Features and Epics to the Product Backlog per the *FX Change Request* process definition. An item may not be added to the Product Backlog until it has been approved by the Project Sponsor, FX EPgMO, and appropriate governance body. Refer to Section 8.3.1 of *P-2: FX Project Management Standards* for details on monitoring and controlling changes and *S-1: FX Governance Plan* for details.
- Documentation of inter-task dependencies.
- Documentation of any external dependencies.
- Updated schedule baseline to include high-level activities.