

P-3: FX PROJECT MANAGEMENT TOOLKIT

Integrated Tools and Methods

TOPICS

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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 Standards described in Florida Administrative Rule 60GG-1.001 through 60GG-1.009, Florida Administrative Code (F.A.C.), also available in the *Reference Materials* document library in the FX Projects Repository.
- The DMS [Florida Cybersecurity Standards](#) described in Florida Administrative Rule 60GG-2.001 through 60GG-2.006, F.A.C., as listed in the Technology Standards Reference Guide (TSRG) located in the *Reference Materials* document library in the FX Projects Repository.
- The DMS Information Technology Architecture Standards for Identity Management described in Florida Administrative Rule 60GG-5.001 through 60GG-5.003, F.A.C., as listed in the Technology Standards Reference Guide (TSRG) located in the *Reference Materials* document library in the FX Projects Repository.
- 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, available in the FX Projects Repository.
- FX Design and Implementation Management Standards: SEAS Contract Deliverable No. T-7, available in the FX Projects Repository.
- Medicaid Enterprise Certification Management Plan: SEAS Contract Deliverable No. P-4, available in the FX Projects Repository.
- FX Strategic Project Portfolio Management Plan: SEAS Contract Deliverable No. S-4, available in the FX Projects Repository.
- FX Governance Plan: SEAS Contract Deliverable No. S-1, available in the FX Projects Repository.
- The FX Enterprise Project Management Office (EPMO) Charter and Program Management Plan available in the FX Projects Repository.
- The FX Organizational Change Management (OCM) Plan available in the FX Projects Repository.
- The FX Artifact Management Standards (AMS) available in the FX Projects Repository.
- FX EPMO Task Estimation Guidance, available in the FX Projects Repository. All initial Agency approved documents are stored and archived in the FX Projects Repository 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

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)

- Change, Risks, Action Items, Issues, Decisions, 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 Topic (DET) 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'd)

Portfolio Management

- Providing input and support for Agency led Legislative Budget Requests (LBRs), Schedule IV-Bs, Operational Work Plans and Advanced Planning Documents.
- 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 Topic (DET) Process and as directed by the Agency

What is SEAS tasked with?

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

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 2020-2021, SEAS shall support the below project and operational activities.

- Core module planning and procurement efforts to include the Unified Operations Center module
- IS/IP Implementation
- EDW Procurement
- EDW Implementation
- Support inputs into FX Governance and the Executive Steering Committee (ESC)
- Support the Portfolio with Advanced Planning Documents (APDs), Operational Work Plans (OWPs), Schedule IV-Bs, Legislative Budget Requests (LBRs)
- Conduct QA on vendor deliverables, work products, artifacts, and other tasks as directed by the Agency

SEAS Initial Deliverables

- **S-3: FX Strategic Plan** – Defines the Vision for the future FX and the areas of focus to achieve that Vision.
- **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-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.
- **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.
- **O-2: FX EPMO Charter and Program Management Plan** – Charters the FX EPMO and establishes the guidelines and operational processes for how the FX EPMO shall manage and/or monitor FX projects.
- **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).

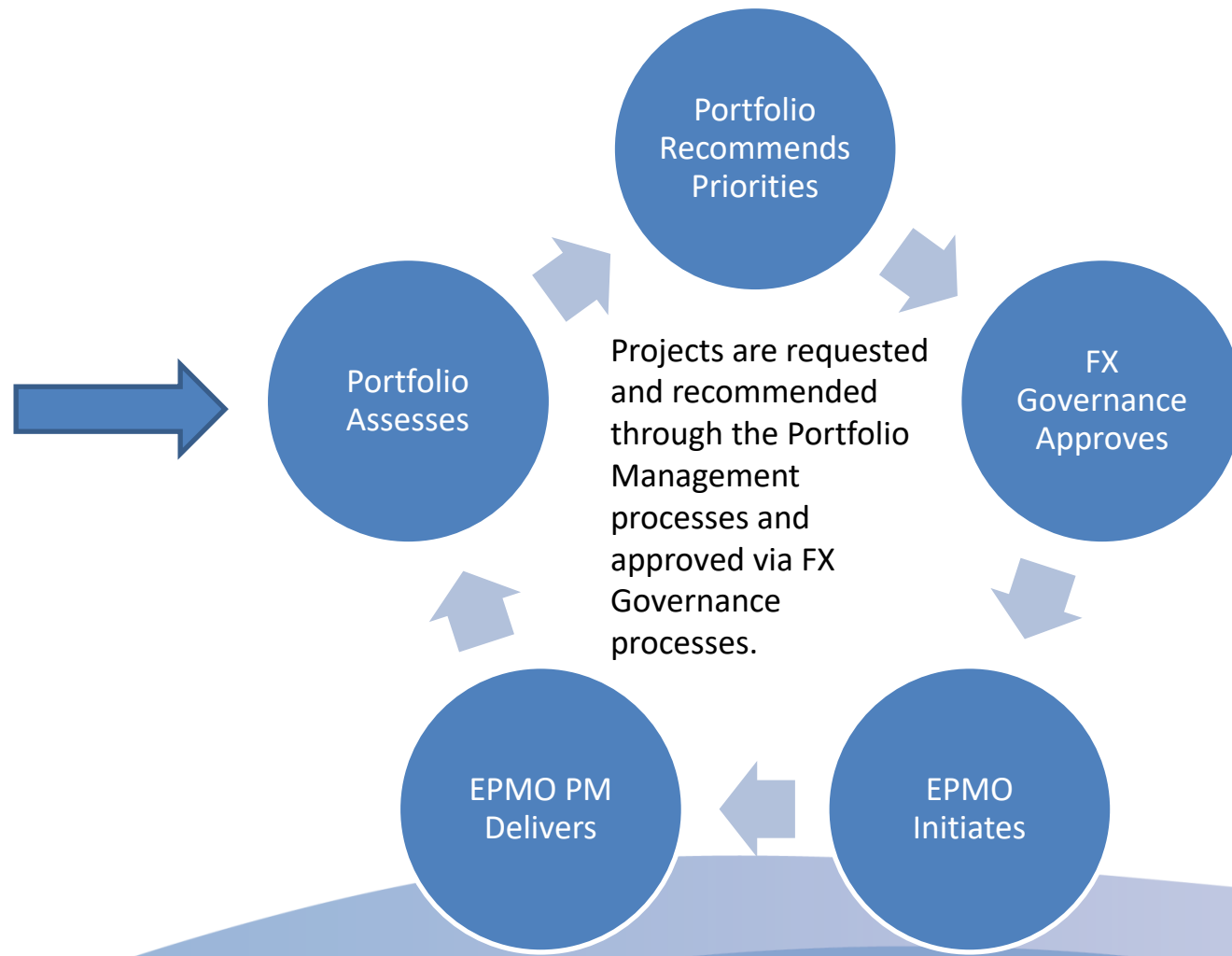


What is the FX EPMO?

What is the FX Enterprise Program Management Office?



How are projects or programs assigned to the EPMO?

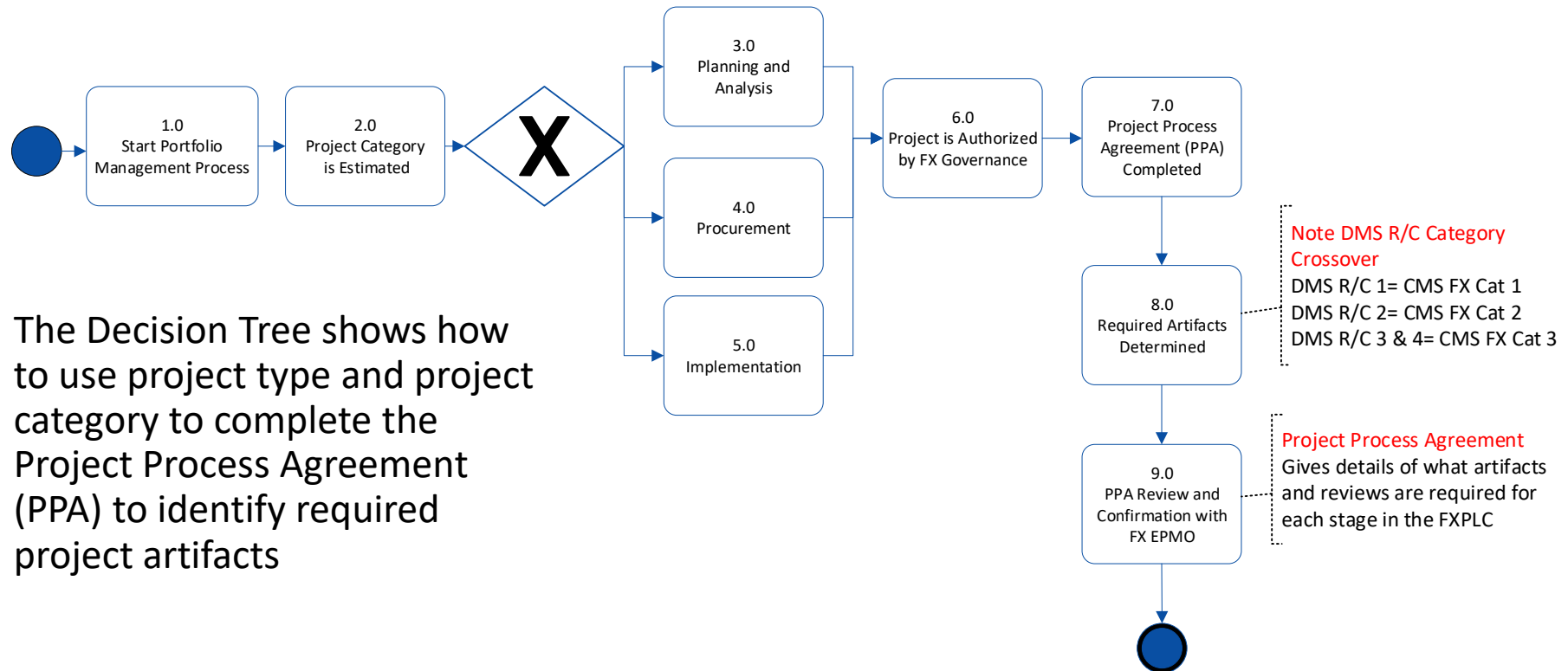


How are Projects or Programs assigned to the EPMO?

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

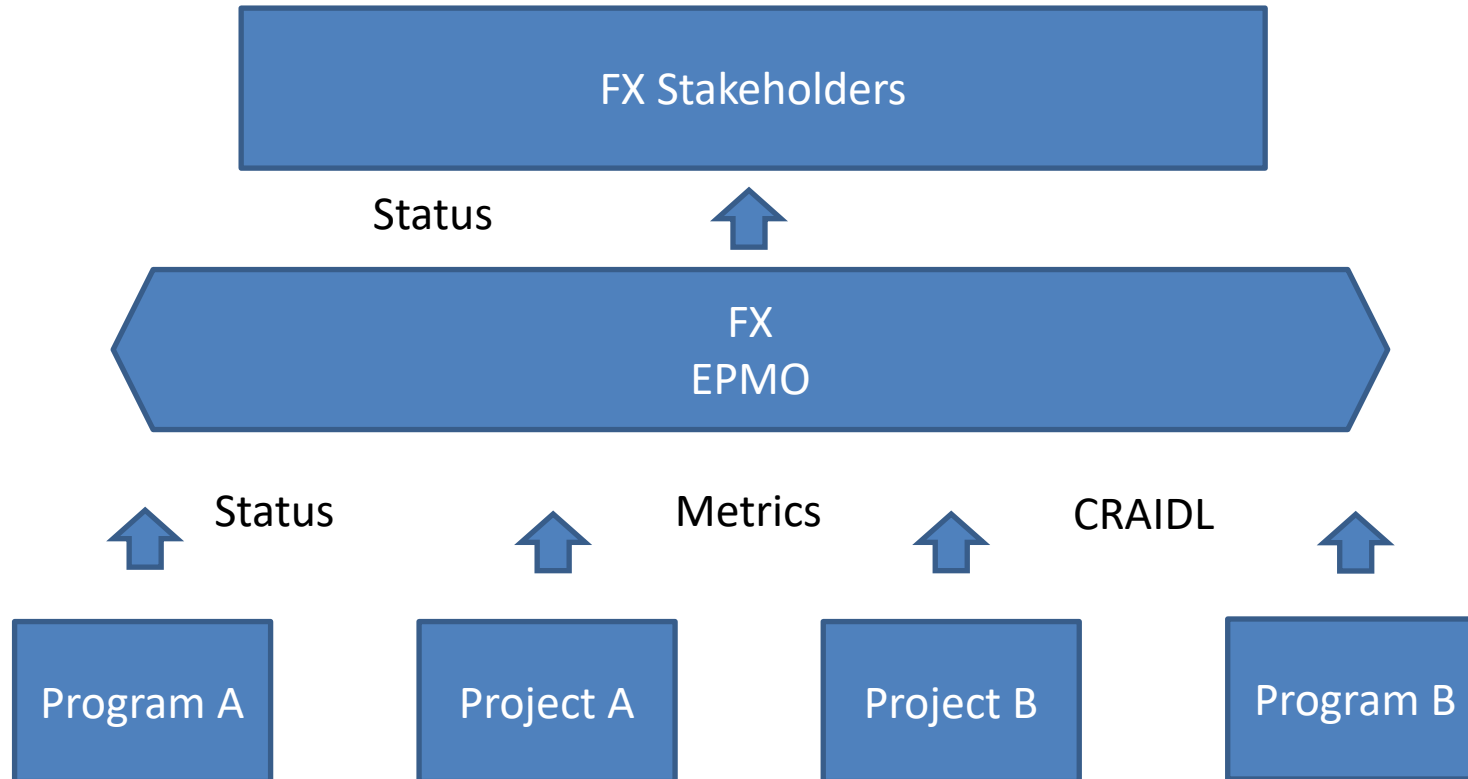
CHARACTERISTIC(S)	MANAGED BY	REQUIRED TO FOLLOW FX PROJECT MANAGEMENT STANDARDS AND REPORT TO FX GOVERNANCE?
Agency-wide FX project	FX EPMO	Yes
Multi-agency FX project led by the Agency	FX EPMO	Yes
FX projects with Risk and Complexity scores of 3 or 4 (per DMS Risk and Complexity tool; whether an IT 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)	<ul style="list-style-type: none"> FX EPMO (preferred) Agency Business Unit Agency IT 	Yes
Non-FX project	<ul style="list-style-type: none"> 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

- 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

- 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

Stages (#.)	1. Strategic Planning	2. Portfolio Management	3. Delivery Management			4. Operations & Maintenance	5. Benefits Realization (continuous throughout life cycle)
Phases (#.#)	1.1 - Stakeholder Interviews	2.1 - Project Identification	3.1 - Initiation			4.1 - Operations & Maintenance (R3 Certification*)	5.1 - Program Management
	1.2 - Market Scans	2.2 - Preliminary Screening	3.2 - Planning			4.2 - Security	5.2 - Governance
	1.3 - Develop Vision	2.3 - Business & Outcome Assessment	3.3 - Execution (sub-phases tailored to project type)			4.3 - Disposition of Product or Service	5.3 - Benefits Monitoring
Subphases (#.#.#)	1.4 - Develop Guiding Principles	2.4 - Technology Assessment	3.3.1 - Planning & Analysis Project	3.3.2 - Procurement Project	3.3.3 - Implementation Project (technical and non-technical)		5.4 - Process Improvement
	1.5 - Develop Strategic Priorities	2.5 - Assessment Decision Memo	3.3.1.1 - Requirements Analysis	3.3.2.1 - Requirements Analysis	3.3.3.1 - Requirements Analysis		5.5 - Stakeholder Management
	1.6 - Develop Goals	2.6 - Final Review	3.3.1.2 - Develop Project Document (e.g., Business Case, other work product)	3.3.2.2 - Develop Procurement	3.3.3.2 - Design Solution (technical or non-technical)		5.6 - Risk Management
	1.7 - Concept of Operations	2.7 - Project Roadmap Management (ongoing)	3.3.1.3 - Document Review & Finalization	3.3.2.3 - Procurement Review (R1 Certification*)	3.3.3.3 - Solution Development/Configuration (non-tech may = creation of a service, e.g., OCM, DataGov)		5.7 - Standards Compliance
	1.8 - Identify Tactics	2.8 - Maintain Outcome Model (ongoing)		3.3.2.4 - Active Procurement	3.3.3.4 - Testing (non-tech may = Agency approval and/or a pilot implementation)		
				3.3.2.5 - Contract Execution	3.3.3.5 - Implementation (R2 Certification*)		
			3.4 - Close Out & Transition				* As Applicable

Modified FXPLC diagram

- 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

CERTIFICATION MILESTONE REVIEWS	FXPLC PHASES	CMS XLC PHASES
<ul style="list-style-type: none"> Project Initiation Milestone Review (R-1) (prior to issuing procurement, so may occur during Execution Phase) 	<ul style="list-style-type: none"> Initiation Phase Planning Phase Execution Phase Requirements Analysis Stage 	<ul style="list-style-type: none"> Initiation, Concept, and Planning Phase Requirements, Analysis, and Design Phase
<ul style="list-style-type: none"> Operational Milestone Review (R-2) 	<ul style="list-style-type: none"> Design Stage Development Stage Test Stage Implementation Stage 	<ul style="list-style-type: none"> Design and Development Phase Implementation Phase
<ul style="list-style-type: none"> Certification Request (once module has been operational for 6 months) MMIS Certification Final Review (R-3) 	<ul style="list-style-type: none"> Project Close Out Phase Transition to Operations and Maintenance 	<ul style="list-style-type: none"> 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 EPMO
- 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 Categorization – Done by FX Project Team
- Develop Project Charter Categorization – 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)
- Primary objective for the FXPR structure is to enable all project team members to access project documentation

FX Projects Repository

— FX Home (Common Area)

- Standards & Plans
- Templates
- Process Definitions
- Project Glossary
- Reference Materials
- Agency MITA
- Recent
- FX Program Administration Shared Documents



FX Projects Repository

- FX Vendor Project Site (Workspace)
 - Project Artifact Directory (PAD)
 - Project Schedules
 - Staffing List
 - Team Member Out of Office Calendar
 - Final Deliverables
 - CRAIDL Logs
 - Meeting Log
 - Task Order Log

Project Risk and Complexity Categorization

PROJECT RISK & COMPLEXITY ASSESSMENT SUMMARY					AST AGENCY FOR HEALTH CARE ADMINISTRATION STATE OF FLORIDA CENTERS FOR MEDICAL TECHNOLOGY	
AGENCY		Agency for HealthCare Administration				
PROJECT		SEAS - Operational Impact Analysis				
Activate Assessment?					PROJECT CATEGORY	
Yes					1) PRE-CHARTER PHASE	
Select Yes / No	▲	Pre-Charter Risk Score	161.54	Low Risk	◆	
		Pre-Charter Complexity Score	203.57	Low Complexity	1 2 3 4	
PROJECT CATEGORY				1		
Activate Assessment?					PROJECT CATEGORY	
Yes					2) INITIATION PHASE	
Select Yes / No	▲	Initiation Risk Score	181.53	Low Risk	◆	
		Initiation Complexity Score	175.70	Low Complexity	1 2 3 4	
PROJECT CATEGORY				1		
Activate Assessment?					PROJECT CATEGORY	
No					3) PLANNING PHASE	
Select Yes / No	▲	Planning Risk Score	Not Scored		◆	
		Planning Complexity Score	Not Scored		1 2 3 4	
PROJECT CATEGORY				1		
<i>Used for Event-Driven Complexity score also</i>						
Activate Assessment?					PROJECT CATEGORY	
No					4) EVENT-DRIVEN ASSESSMENT	
Select Yes / No	▲	Event-Driven Risk Score	Not Scored		◆	
		Event-Driven Complexity Score	Not Scored		1 2 3 4	
PROJECT CATEGORY				1		
<i>Carried forward from Planning Complexity score</i>						
OVERALL PROJECT RISK & COMPLEXITY ASSESSMENT					OVERALL PROJECT CATEGORY	
Overall Risk Score		181.53		Low Risk	◆	
Overall Complexity Score		175.70		Low Complexity	1 2 3 4	
PROJECT CATEGORY				1		

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

Project Process Agreement

Project Process Agreement - Artifacts						
Project Name		<Enter Project Name>	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	
Project Description		<Enter Project Description>				
Project Type		Certified DDI				
Complexity Level		3				
Project-Specific Items		1				
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 consider... complexity, Miles...				variance requested

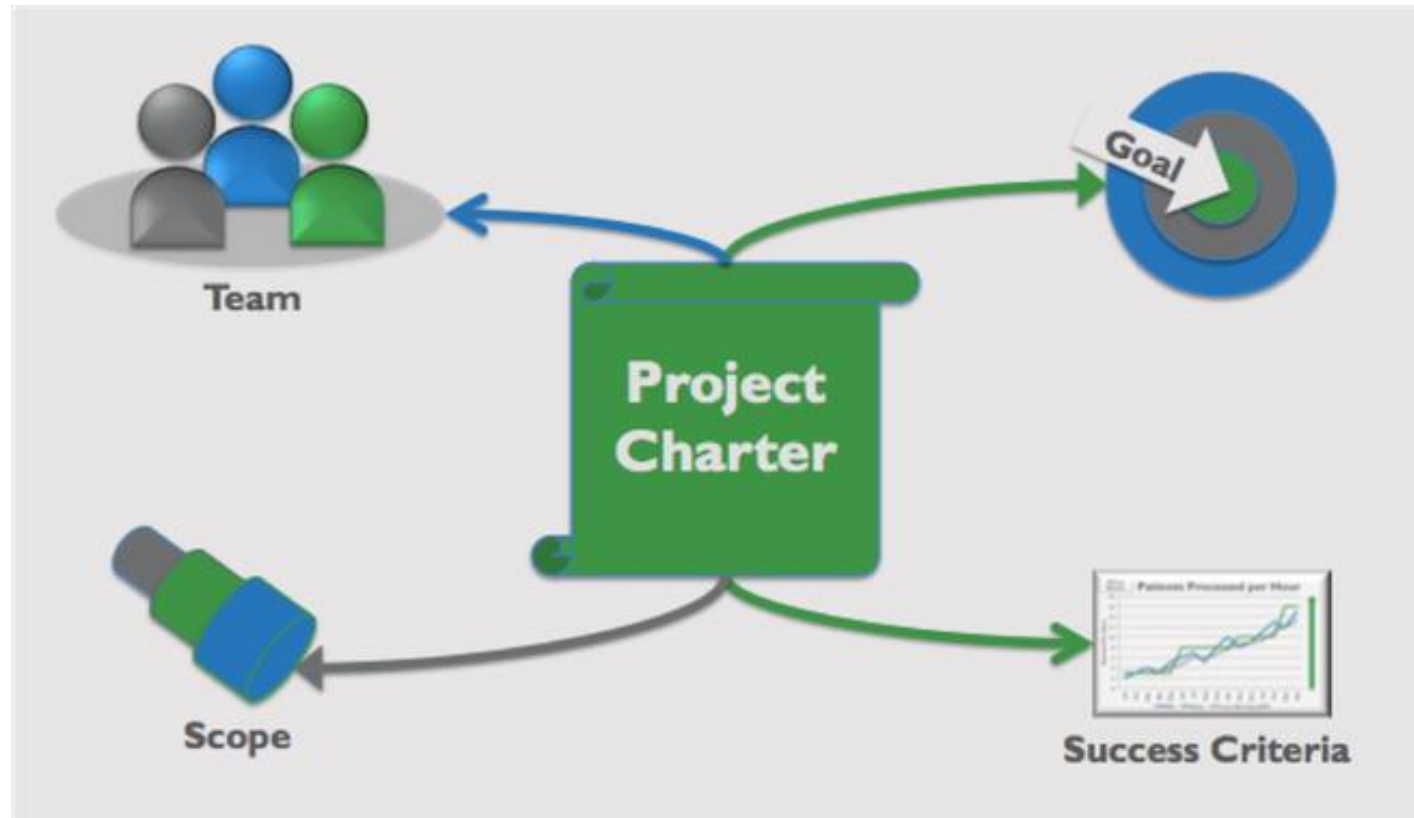
- Adapted from XLC methodology
- Cornerstone of project requirements
- Artifacts / Tools / Templates / Reviews
- FX purposed to fit any size and type of project

Identify Key FX Project Stakeholders

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



Develop Project Charter



FX Project Planning

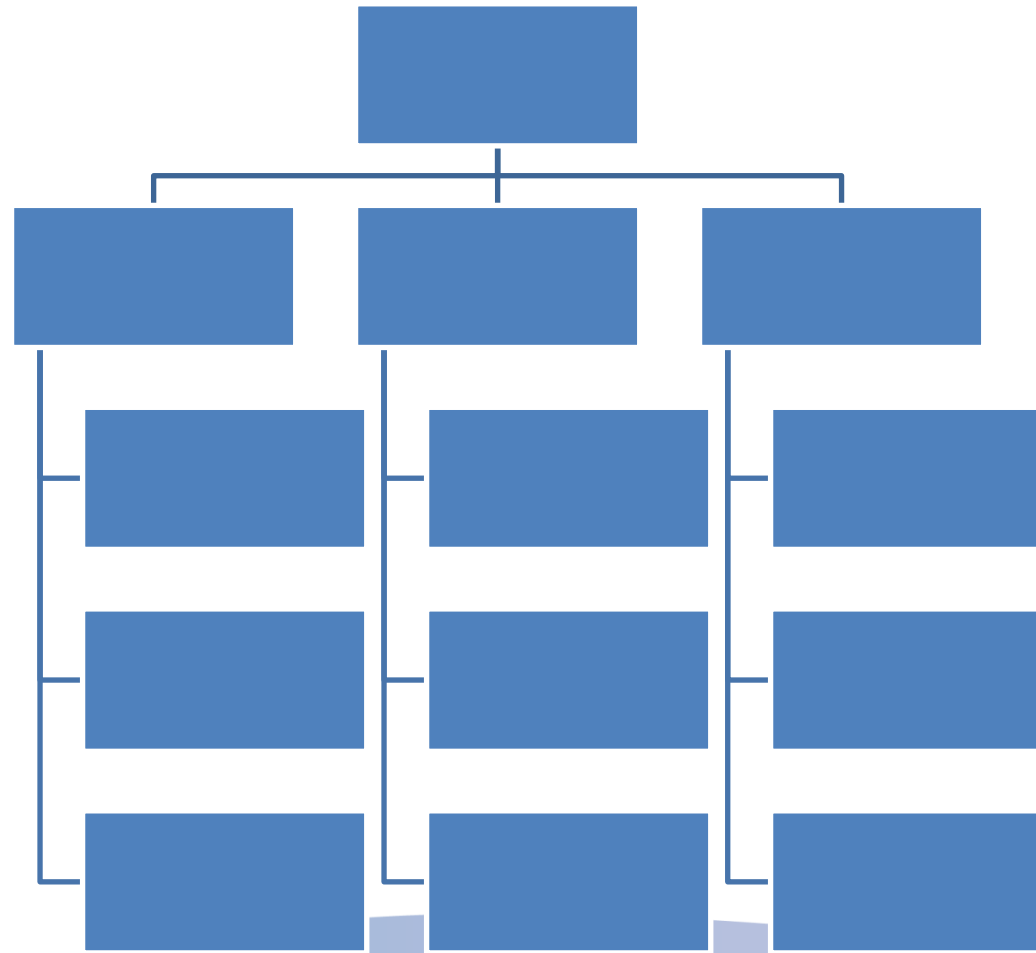
FX Project Planning Stage

- 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)

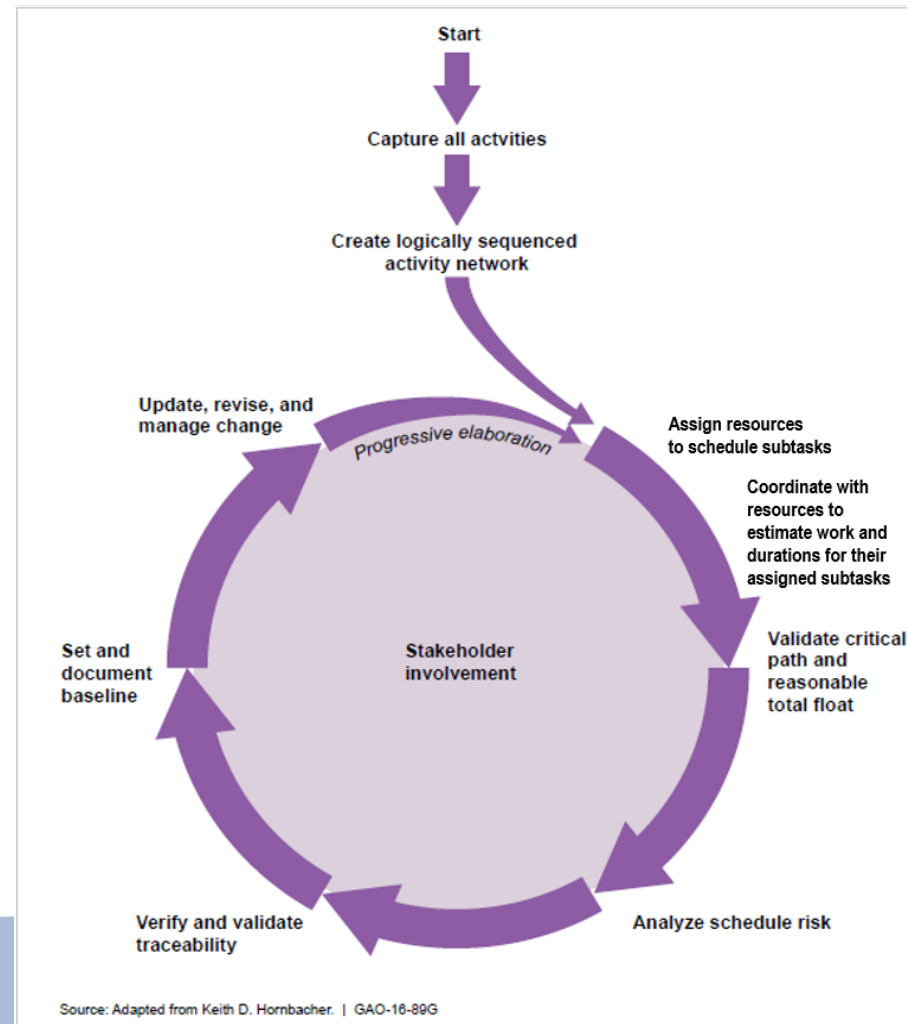


Develop Work Breakdown Structure (WBS)

WBS LEVEL	WBS LEVEL NAME	WBS LEVEL EXPLAINED
1	<ul style="list-style-type: none"> Project Level 	<ul style="list-style-type: none"> The Project Summary Task, which represents 100% of the project's scope of work.
1.x	<ul style="list-style-type: none"> Project Stages 	<ul style="list-style-type: none"> Separates project work into distinct project management process groups, as follows: <ul style="list-style-type: none"> › Project Management › Initiation › Planning › Execution › Close Out
1.x.x	<ul style="list-style-type: none"> Work Package 	<ul style="list-style-type: none"> Separates each phase (process group) into individual work packages work, e.g. Business Process Analysis, Development, etc.
1.x.x.x	<ul style="list-style-type: none"> Work Package Track 	<ul style="list-style-type: none"> Further organizes work of individual work packages into separate tracks or workstreams.
1.x.x.x.x	<ul style="list-style-type: none"> Deliverable Release 	<ul style="list-style-type: none"> <u>Deliverable</u>: Identifies the discrete deliverables associated with each workstream track. <u>Release</u>: Identifies releases within system development.
1.x.x.x.x.x	<ul style="list-style-type: none"> Subtask / Activity 	<ul style="list-style-type: none"> 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* in the FX Projects Repository, Section 6.3.



Project Schedule Standards

- FX EPMO will conduct a Quality Check (QC) review of the Project Schedule using the Schedule QC Checklist (located at Florida Health Care Connections > 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.

FX Project Planning Stage - Risks

- Identify Risks
- Perform Risk Assessment
- Plan Risk Response

Identify Risks

- Risk Title
- Risk Description
- Risk Originator
- Risk Trigger Description
- Project

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

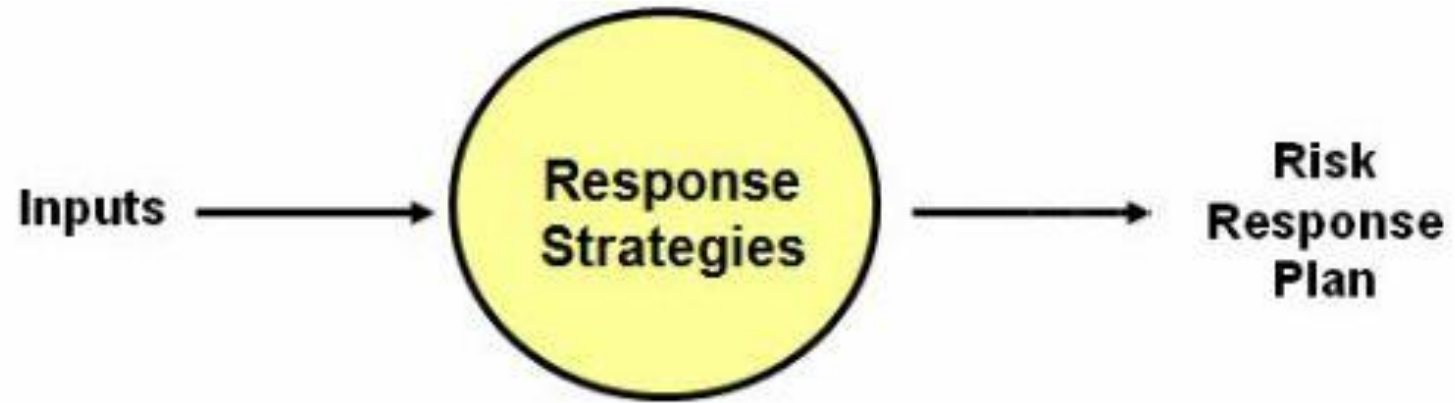
Impact	Dimensions to Consider				Numeric Value
	Cost	Schedule	Scope	Quality	
Low	Impact to cost is below appropriation	No or little impact to project schedule	Minor clarification to existing scope	Project quality is not in jeopardy	1
Medium	Impact to cost is above appropriation by less than 10%	Schedule impact is possible	Scope change is noticeable, but not deemed significant	Impact to quality possible	3
High	Impact to cost is above appropriation by greater than 10%	There is significant impact to schedule and deliverable due dates	There is a significant change in scope	Impact to quality is very likely	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

- 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



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)
- Decision Relating to Project Schedule, Deliverable, or Scope

Manage Project - Communication Management

- FX Meeting and Email Standards
 - Schedule Appointment Information
 - Definition of Formal vs. Informal Meetings
 - Meeting agenda/materials/minutes
 - Who to invite
 - Logging Meetings in the Meeting Log
 - Guidelines for Meeting Attendees
 - Email Standards
- Booking Conference Rooms/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

- Comply with FX Artifact Management Standards (located at SEAS > Documents > Programmatic Domain > Final) and FX Technology Standards for all deliverables per ITN and Contract (located at Florida Health Care Connections > Standards & Plans > Category: Technology).
- Vendor to develop and submit a Deliverable Expectations Document (DED) (template located at Florida Health Care Connections > Templates > Category: EPMO).

Deliverable Management

- 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

- 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

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

Using FX Project Templates

- Approved FX templates reside in the Florida Health Care Connections site 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 PM 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

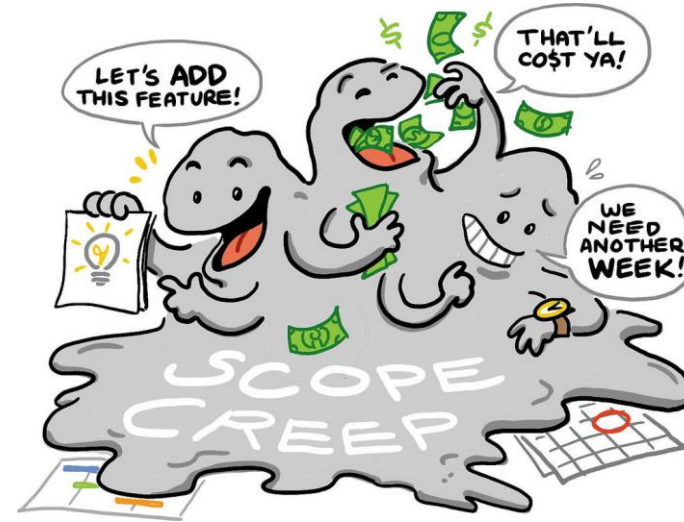


- Monitoring and Controlling Scope
- Monitoring and Controlling Schedule
- Monitoring and Controlling CRAIDL
- Monitoring and Controlling Performance
- Monitoring and Controlling Outcomes and Benefits
- Monitoring and Controlling Cost



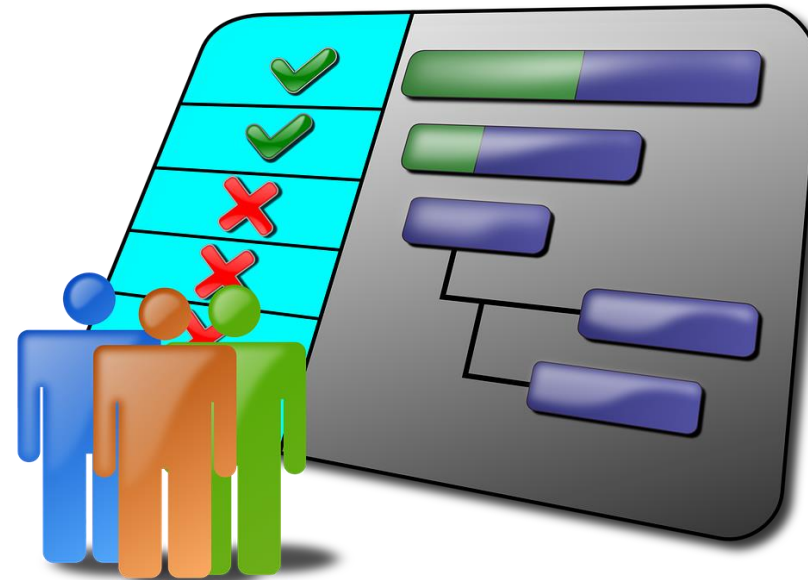
Monitoring and Controlling Scope

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

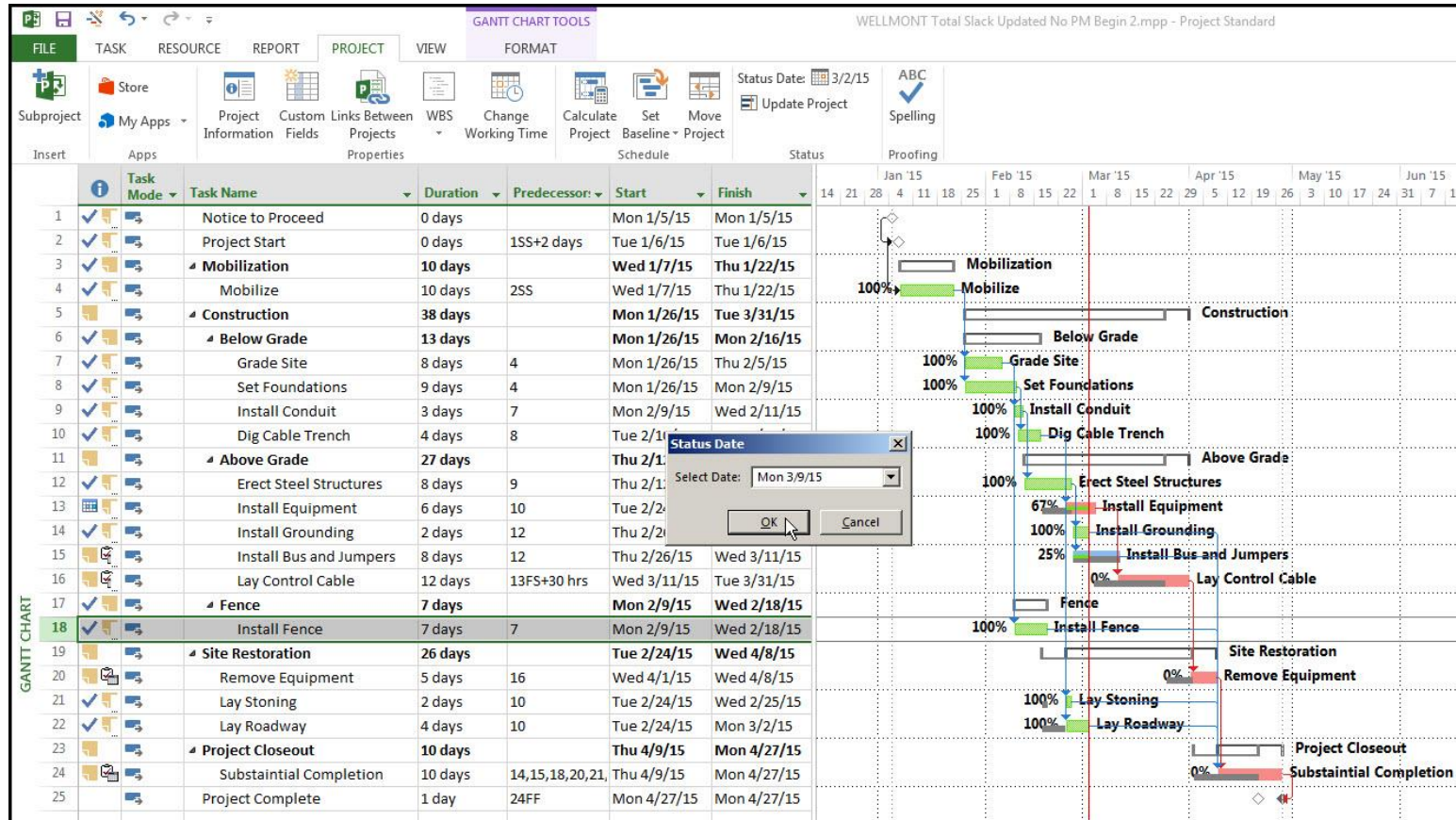


Monitoring and Controlling Schedule

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



Monthly Work Plan

SEAS Operations - Project Professional

Charles Cold

ID	Summ	OpsCategory	Fx Area	LOE	Critical	Status	WBS	Task Name	% Compl	Duration	Start	Finish
0	Yes	General Ops	SEAS Organization	No	Yes	On Schedule	0	SEAS Operations	51%	488 days	7/9/2018	6/30/2020
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	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	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	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	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	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	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	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	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	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	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	No	Deliverables	EPMO	No	Yes	Future Task	10.2.1.2.1.	ht Plan (O-1) - Q2	0%	15 days	11/1/2019	11/22/2019
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	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	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	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	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	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	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	Yes	Deliverables	EPMO	Yes	Yes	On Schedule	10.2.1.2.1.	terly Deliverable Refresh	89%	64 days	7/1/2019	9/30/2019
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	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	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	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	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	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	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	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	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	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

More Views

- FX-EVM
- FX-Monthly-Work-Plan
- FX-OPS-DEFAULT
- FX-Ops-Look-Ahead
- FX-Ops-Resource-Usage
- FX-QA-View
- FX-StatusRptView
- FX-Tableau-Export
- FX-Team-Planner-OA
- FX-Variance-Report
- Gantt Chart

Buttons: New, Edit, Copy, Organizer, Apply, Cancel



Schedule Revisions Change Control

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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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
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741	741	Yes	Deliverables	EPMO	Yes	Yes	On Schedule	10.2.1.2.1.1	Deliverable Refresh - Q1	89%	64 days	7/1/2019	9/30/2019
744	744	No	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.1	Management Plan (O-1) - Q1	65%	20 days	9/3/2019	9/30/2019
745	745	Yes	Deliverables	EPMO	Yes	Yes	Future Task	10.2.1.2.1.1	Deliverable Refresh - Q2	0%	53 days	10/1/2019	12/20/2019
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747	747	No	Deliverables	EPMO	No	Yes	Future Task	10.2.1.2.1.1	Management Plan (O-1) - Q2	0%	15 days	11/1/2019	11/22/2019
758	758	Yes	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.1	Deliverable Refresh - Q1	24%	242 days	7/1/2019	6/30/2020
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763	763	No	Deliverables	EPMO	No	Yes	On Schedule	10.2.1.2.1.1	Management Plan (O-2) - Q1	65%	20 days	9/3/2019	9/30/2019
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796	796	Yes	Deliverables	EPMO	Yes	Yes	On Schedule	10.2.1.2.1.1	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	10.2.1.2.1.1	Review and Approve Updates - SEAS Project Management Toolkit (P-3)- Q1	65%	20 days	9/3/2019	9/30/2019

Set Baseline

Set baseline
Baseline (last saved on 9/13/2019)

Set interim plan
Copy: Scheduled Start/Finish

Into: Start1/Finish1

For:

Entire project

Selected tasks

Roll up baselines:

To all summary tasks

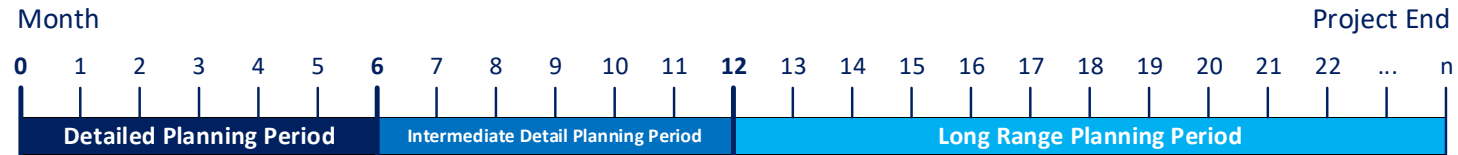
From subtasks into selected summary task(s)

Set as Default

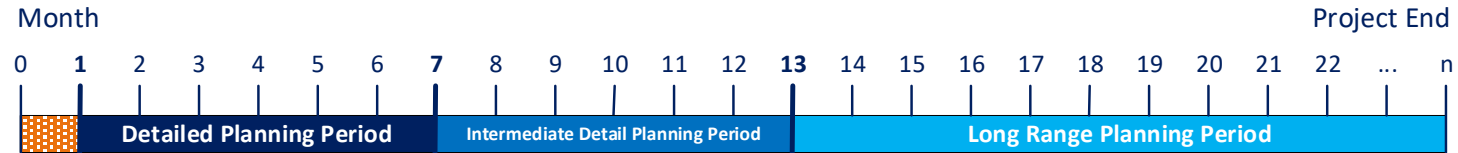
Help OK Cancel

NH OPS LOOKAHEAD

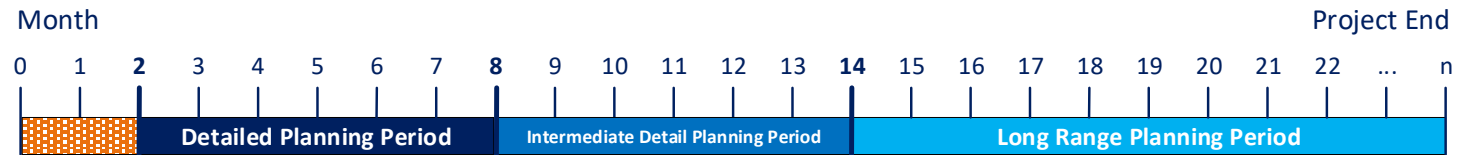
Rolling Wave Planning



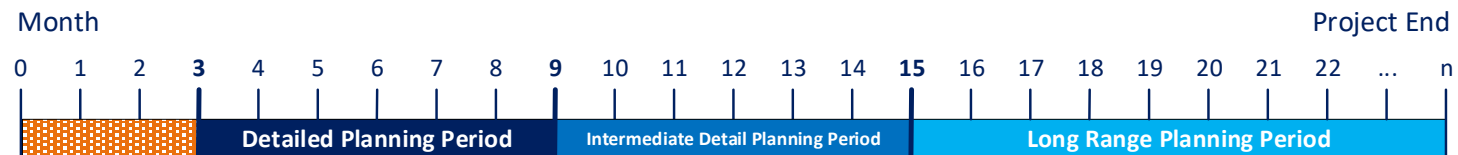
Project Start



1st Rolling Wave Planning Session

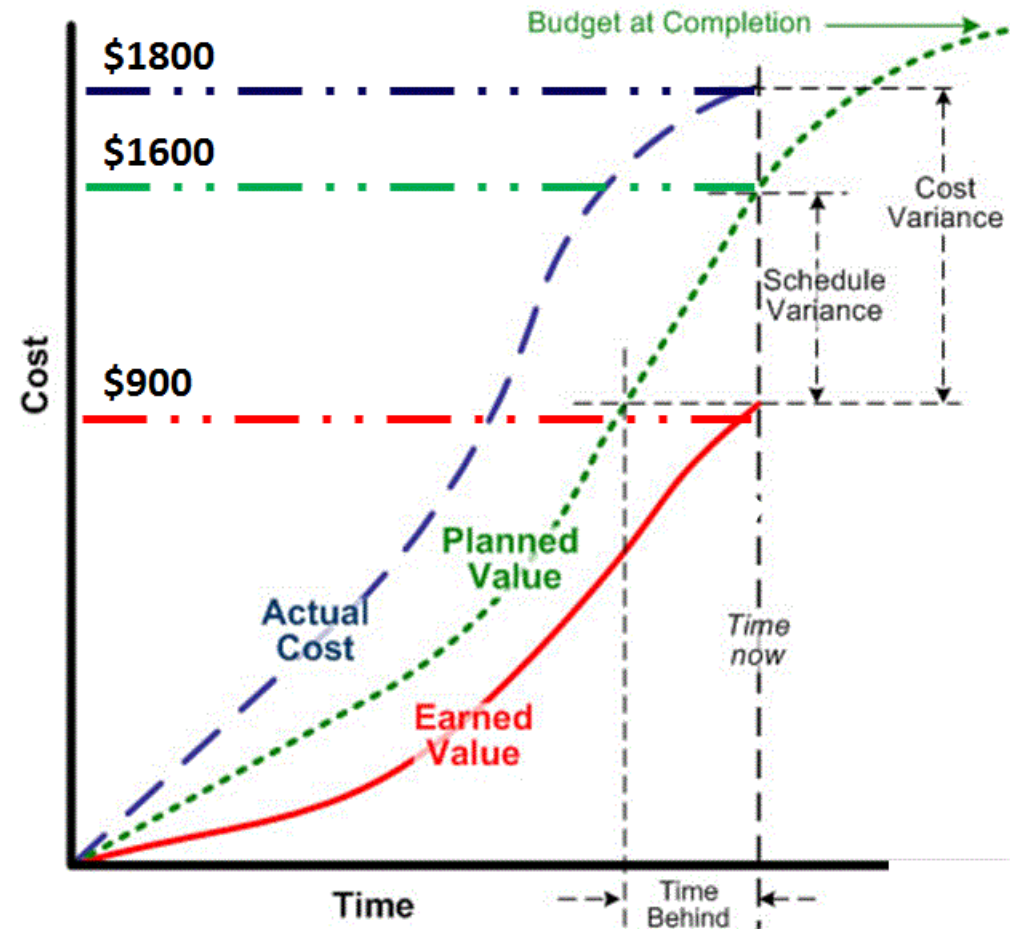


2nd Rolling Wave Planning Session



3rd Rolling Wave Planning Session

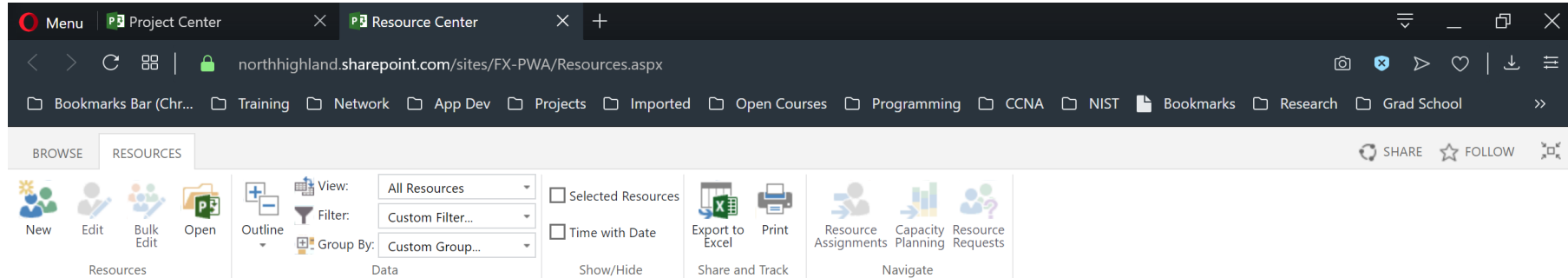
Schedule Analysis and Schedule Variance



Mitigating Schedule Delays



Enterprise Resource Pool

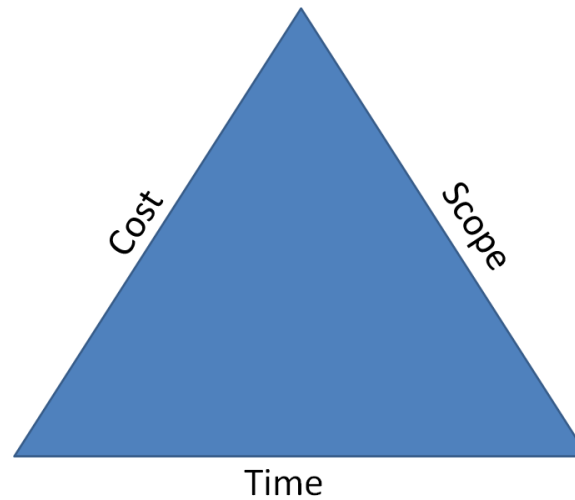


	ID	Resource Name ↑	FX-Resour	Max Unit	FX-Available-Ea	FX-Available-La	FX-Resource-Role	FX-Domain	FX-Subdomain	RBS
		FX-Resource-Group: SEAS								
		Generic: No		100%						
<input type="checkbox"/>	2,150	Anne Frost	SEAS	100%	7/1/2019	6/30/2020	IT Procurement Manager	Programmatic	HHS	FX.SEAS.Pr
<input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

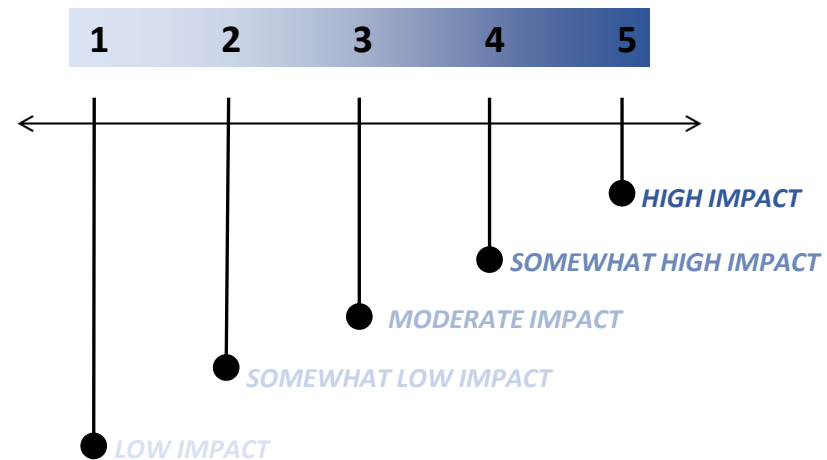
Decision Impact Score Summary

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

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, input meetings on the Meeting Log and 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 Project Schedule Review Meeting
 - Schedule and facilitate Project Status Meetings
 - Input, monitor, and control CRAIDL Logs and project- and program-related CRAIDL Items
 - For SEAS-owned meetings, input meetings on the Meeting Log, 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 project 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 Schedule Review Meetings and provide updates on assigned tasks
 - Attend Weekly 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 FX Vendor-owned meetings, input meetings on the Meeting Log and provide agendas and minutes
 - Manage assigned activities and team members

Q & A

Questions?