NMSIIS

NEW MEXICO STATEWIDE IMMUNIZATION INFORMATION SYSTEM

HOSTING, MAINTENANCE AND SUPPORT

PROJECT MANAGEMENT PLAN (PMP)
EXECUTIVE SPONSOR – Mark Williams
BUSINESS OWNER - Daniel Burke
PROJECT MANAGER – Sharon Zuidema
ORIGINAL PLAN DATE: May 08, 2014
REVISION DATE: January 27, 2016
REVISION: 2.0
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<table>
<thead>
<tr>
<th>REVISION NUMBER</th>
<th>DATE</th>
<th>COMMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>May 08, 2014</td>
<td>Original Version Created</td>
</tr>
<tr>
<td>2.0</td>
<td>January 27, 2016</td>
<td>The RFP process was delayed and took more time than originally forecast</td>
</tr>
<tr>
<td>2.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PREPARING THE PROJECT MANAGEMENT PLAN

The workbook for preparation of the Project Management Plan is built around helping the project manager and the project team to use the Project Management Plan in support of successful projects. Please refer to it while developing this PMP for your project.

ABOUT THIS DOCUMENT

Project Oversight Process Memorandum – DoIT, July 2007

“Project management plan” is a formal document approved by the executive sponsor and the Department and developed in the plan phase used to manage project execution, control, and project close.

The primary uses of the project plan are to document planning assumptions and decisions, facilitate communication among stakeholders, and documents approved scope, cost and schedule baselines.

A project plan includes at least other plans for issue escalation, change control, communications, deliverable review and acceptance, staff acquisition, and risk management.

“Project manager” means a qualified person from the lead agency responsible for all aspects of the project over the entire project management lifecycle (initiate, plan, execute, control, close). The project manager must be familiar with project scope and objectives, as well as effectively coordinate the activities of the team. In addition, the project manager is responsible for developing the project plan and project schedule with the project team to ensure timely completion of the project. The project manager interfaces with all areas affected by the project including end users, distributors, and vendors. The project manager ensures adherence to the best practices and standards of the Department.

Project product” means the final project deliverables as defined in the project plan meeting all agreed and approved acceptance criteria.

“Product development life cycle” is a series of sequential, non-overlapping phases comprised of iterative disciplines such as requirements, analysis and design, implementation, test and deployment implemented to build a product or develop a service.

1.0 PROJECT OVERVIEW

The Project Overview sets the stage for the details of the project and begins the “story” of the project and plan.

1.1 EXECUTIVE SUMMARY- RATIONALE FOR THE PROJECT

The vision of the New Mexico Department of Health (NMDOH) is a healthier New Mexico.

NMDOH is responsible for the promotion of health and wellness, improving health outcomes, and assuring safety net services for all people in New Mexico.
The mission of the Public Health Division within NMDOH is to work with individuals, families, and communities in New Mexico to achieve optimal health. We provide public health leadership by assessing health status of the population, developing health policy, sharing expertise with the community, assuring access to coordinated systems of care and delivering services to promote health and to prevent disease, injury, disability and premature death.

This project focuses on the mission of the New Mexico Immunization Program to protect New Mexico’s children and adults from vaccine-preventable diseases. It is also the goal of NMDOH to reduce health disparities and address different racial/ethnic groups in a conscious effort to reduce health disparities. Currently, the NMDOH operates a customized version of the Wisconsin Immunization Registry (WIR) system. New Mexico adopted the New York State version of the WIR system for its implementation of NMSIIS (2009). Significant modifications have been made to the NMSIIS since it was implemented. The NMSIIS application provides the ability for health and medical practices to enter immunization data and analyze and track immunization activity for individuals from birth to death throughout New Mexico. In addition, its data is used to evaluate the effectiveness of the statewide Immunization Program, determine the need for new programs, and identify underserved populations. In 2012, a major upgrade was implemented to enable automated electronic data exchange. New Mexico’s current version of NMSIIS has functionality and maintenance issues. Envision Technology Partners was awarded the contract in May 2015 as a result of a competitive bid process.

Envision will be providing a license to WebIZ application services, hosting in Azure Government Cloud environment, support and on-going maintenance at the close of the project. They will incorporate the appropriate WebIZ modules and other modifications tailored to New Mexico’s needs. Costs for on-going support and maintenance after go-live have been separated out from project costs.

### 1.2 FUNDING AND SOURCES

<table>
<thead>
<tr>
<th>SOURCE</th>
<th>AMOUNT</th>
<th>ASSOCIATED RESTRICTIONS</th>
<th>APPROVERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOHIM1501</td>
<td>$300,000</td>
<td>Expires Dec. 2015</td>
<td>DANIEL BURKE</td>
</tr>
<tr>
<td>DOHIM1601</td>
<td>$300,763</td>
<td>Expires Dec 2016</td>
<td></td>
</tr>
</tbody>
</table>

### 1.3 CONSTRAINTS

Constraints are factors that restrict the project by scope, resource, or schedule.

<table>
<thead>
<tr>
<th>NUMBER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Expiration of license for old system (June 1, 2016)</td>
</tr>
</tbody>
</table>
1.4 DEPENDENCIES
Types include the following and should be associated with each dependency listed.

- Mandatory dependencies are dependencies that are inherent to the work being done.
- Discretionary dependencies are dependencies defined by the project management team. This may also encompass particular approaches because a specific sequence of activities is preferred, but not mandatory in the project life cycle.
- External dependencies are dependencies that involve a relationship between project activities and non-project activities such as purchasing/procurement.

<table>
<thead>
<tr>
<th>NUMBER</th>
<th>DESCRIPTION</th>
<th>TYPE M,D,E</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Vendor needs to complete build by May 1, 2016</td>
<td>M</td>
</tr>
<tr>
<td>2</td>
<td>Testing needs to be completed successfully for acceptance</td>
<td>M</td>
</tr>
</tbody>
</table>

1.5 ASSUMPTIONS
Assumptions are planning factors that, for planning purposes, will be considered true, real, or certain.

<table>
<thead>
<tr>
<th>NUMBER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Vendor will meet deadlines</td>
</tr>
<tr>
<td>2</td>
<td>Current system will continue to function successfully</td>
</tr>
<tr>
<td>3</td>
<td>New system will meet specifications</td>
</tr>
</tbody>
</table>

1.6 IMPLEMENTATION PROJECT PHASE RISKS IDENTIFIED
In this section identify and describe how each risk will be managed. Include the steps that will be taken to maximize activity that will result in minimizing probability and impact of each risk.

Risk 1: On-Line Training

Description – Due to financial constraints the contractor who was to create the on-line module is no longer employed.

<table>
<thead>
<tr>
<th>Probability: Medium</th>
<th>Impact: High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mitigation Strategy: Locate alternative resource</td>
<td></td>
</tr>
<tr>
<td>Contingency Plan: Working with Melissa Walker for alternative resource</td>
<td></td>
</tr>
</tbody>
</table>
2.0 PROJECT AUTHORITY AND ORGANIZATIONAL STRUCTURE

The Project Organization describes the roles and responsibilities of the project team. It also identifies the other organizational groups that are part of the project and graphically depicts the hierarchical configuration of those groups. It exists to clarify interaction with the project team.

2.1 STAKEHOLDERS

List all of the major stakeholders in this project, and state why they have a stake. Stakeholders are individuals and organizations that are actively involved in the project, or whose interests may be positively or negatively affected as a result of project execution or project completion. They may also exert influence over the project and its results.

<table>
<thead>
<tr>
<th>NAME</th>
<th>STAKE IN PROJECT</th>
<th>ORGANIZATION</th>
<th>TITLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOH Immunization Program</td>
<td>Better functioning immunization registry. Improved inventory control leading to less wastage.</td>
<td>NMDOH</td>
<td></td>
</tr>
<tr>
<td>Health Care Providers</td>
<td>Understand, adapt to and comply with new processes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health Care consumer</td>
<td>Better overall access of immunization information for the citizens of the State of New Mexico.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Terry Reusser</td>
<td>Integration of applications which improves efficiency and reduces demand for support by automating the process.</td>
<td>ITSD, NMDOH</td>
<td>CIO</td>
</tr>
<tr>
<td>Dan Burke</td>
<td>Better functioning immunization registry to provide the state improved process for inventory thereby improving the accountability and efficiency of public dollars used.</td>
<td>PHD, NMDOH</td>
<td>PHD Director</td>
</tr>
</tbody>
</table>
### 2.2 PROJECT GOVERNANCE STRUCTURE

#### 2.2.1 Describe the organizational structure – Org Chart

- **Mark Williams, PHD**
  - Division Director
  - Terry Reusser, CIO

- **Steering Committee**

- **Daniel Burke**
  - Project Director

- **Sharon Zuidema**
  - Project Manager

- **DOH Technical Staff**
- **Implementation Contractor**

- **IV&V Consultant**
- **Business Process Team**

#### 2.2.2 Describe the role and members of the project steering committee

Members of the Steering committee members are Mark Williams, Daniel Burke, Erica Martinez, Terry Reusser, Paula Morgan, Sandeep Patel, Gene Lujan, Helene Minot and Sharon Zuidema.

The Steering Committee is chartered to provide governance over the direction and support of the project and is chaired by the Project Director. The Steering Committee member responsibilities include:

<table>
<thead>
<tr>
<th>NAME</th>
<th>Stake in Project</th>
<th>Organization</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Erica Martinez</td>
<td>The Immunization Registry will have improved functionality and reporting capabilities.</td>
<td>PHD, NMDOH</td>
<td>Immunization Program Manager</td>
</tr>
</tbody>
</table>

---

**Erica Martinez**

The Immunization Registry will have improved functionality and reporting capabilities.

**PHD, NMDOH**

Immunization Program Manager
• Attend and participate in meetings
• Review and accept deliverables
• Review presented documentation
• Balance larger picture versus detail of project
• Review project funding and expenditures
• Champion the project
• Contribute to lessons learned

2.2.3 ORGANIZATIONAL BOUNDARIES, INTERFACES AND RESPONSIBILITIES

The NMSIIS Project Team which consists of Department of Information Technology and Immunization Department staff will work closely with the grantee, Envision Technology Partners in project management, subject expertise, conversion decision making and technical oversight.

2.3 EXECUTIVE REPORTING

Meeting agendas, minutes, and supporting documentation will be provided using the following software packages: Microsoft Word, Excel, PowerPoint, Outlook and Project. Every attempt will be made to publish the meeting minutes in a timely fashion and no later than 2 days prior to the next regularly scheduled meeting. Any meeting called should have an agenda, attempt to start and finish on time. The time allocated to each agenda topic will vary depending on the depth of issues to be covered. Items not able to be covered within the meeting time and accepted to be postponed may be added to the next standing meeting’s agenda or may require a special meeting.

The meeting times and distributions of the meeting minutes for the project are as follows:

Project Team Meetings will be on a regular schedule. The scribe will be assigned by the Project Manager. The project team meetings will be posted in the electronic document libraries by the Project Manager.

Special Session Meetings may be called at the request of the Project Director or Project Manager. A range of issues may require a special meeting of a team, committee or subset. These meetings will be scheduled to accommodate the majority of attendees. The minutes from these meetings will be posted in the document library and e-mailed to all attendees.

Status reports will be used to track progress and issues. Project Team members will provide status reports as requested by the Project Manager. These reports will be in addition to such reports prepared upon request and by other contractors. Monthly DoIT status reports will be submitted by the Project Manager.

Issues and risk management and resolution help to resolve those issues or risks not anticipated during planning process. Issues or risks should be reported at the earliest possible time so that corrective action and risk mitigation can be developed to address with the issue or risk. The corrective action should address both the immediate need and the underlying cause of the issue or risk. The Project Manager will keep an issue and risk tracking log and will work with the Project Team for corrective action.

The Project Manager will maintain an action item list. This action item list identifies the action item, the reference item, the responsible party, solution, and the due and completion dates. Updates may also be reflected in meeting minutes.
3.0 SCOPE

3.1 PROJECT OBJECTIVES

3.1.1 BUSINESS OBJECTIVES

<table>
<thead>
<tr>
<th>NUMBER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Objective 1</td>
<td>Improved health outcomes for the people of New Mexico</td>
</tr>
<tr>
<td>Business Objective 2</td>
<td>Improved quality, accessibility and utilization of health care services</td>
</tr>
<tr>
<td>Business Objective 3</td>
<td>Improved fiscal accountability</td>
</tr>
<tr>
<td>Business Objective 4</td>
<td>Technology supports timely, data-driven decisions; improved business operations; and improved public information and education</td>
</tr>
</tbody>
</table>

3.1.2 TECHNICAL OBJECTIVES

<table>
<thead>
<tr>
<th>NUMBER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Objective 1</td>
<td>An improved and integrated NMSIIS application will provide better information to all stakeholders with regard to the health of the citizens of New Mexico.</td>
</tr>
<tr>
<td>Technical Objective 2</td>
<td>Implement a more recently developed IIS with improved functionality, lower support and maintenance costs and reduced time devoted to maintenance and support issues.</td>
</tr>
<tr>
<td>Technical Objective 3</td>
<td>Develop and provide technical training for the provider community.</td>
</tr>
<tr>
<td>Technical Objective 4</td>
<td>Complete Requirements and Configuration documentation and Time Line for NMSIIS application.</td>
</tr>
<tr>
<td>Technical Objective 5</td>
<td>Implement NMSIIS in test environment.</td>
</tr>
<tr>
<td>Technical Objective 6</td>
<td>Develop test plan and scripts for NMSIIS. Execute test scripts in test environment. Track and fix defects.</td>
</tr>
<tr>
<td>Technical Objective 7</td>
<td>Implement NMSIIS in production.</td>
</tr>
<tr>
<td>Technical Objective 8</td>
<td>Ensure secure integration not only for storing and exchanging information but also for coordinating the full life-cycle of provider support of the health care recipient and vendor(s).</td>
</tr>
</tbody>
</table>

3.2 PROJECT EXCLUSIONS

3.3 CRITICAL SUCCESS FACTORS

Identify the critical success factors for achieving success in this project. Metric are key to understanding the ability of the project to meet the end goals of the Executive Sponsor and the Business Owner, as well
as the ability of the project team to stay within schedule and budget. See also section 6.7 Quality Objectives and Controls.

<table>
<thead>
<tr>
<th>NUMBER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>QUALITY METRICS 1</td>
<td>Strict adherence to the RFP process to ensure NMDOH selects the most advantageous software solution.</td>
</tr>
<tr>
<td>QUALITY METRICS 2</td>
<td>Independent verification and validation review will be conducted on all project deliverables.</td>
</tr>
<tr>
<td>QUALITY METRICS 3</td>
<td>Requirements captured, documented and tracked throughout the project are met.</td>
</tr>
</tbody>
</table>

4.0 PROJECT DELIVERABLES AND METHODOLOGY

4.1 PROJECT MANAGEMENT LIFE CYCLE

<table>
<thead>
<tr>
<th>Phase</th>
<th>Summary of Phase</th>
<th>Key Deliverables</th>
</tr>
</thead>
</table>
| INITIATION | | • Prepare and present project certification documentation – initiation phase  
• Initiate project structure  
• Develop planning groups for all sub projects and initiate planning activities |
| PLANNING | | • Prepare and present Project Management Plan for certification  
• Prepare high-level schedule  
• Finalize project structure  
• Negotiate and execute IV&V contract  
• Procure necessary contract resources and systems. |
| IMPLEMENTATION | | • Prepare and present updated Project Management Plan – implementation phase  
• Technical Architecture approved |
| Closeout | • Manage implementation vendor contracting preparation
• Execute implementation vendor contract amendment
• Implementation of upgrade
• Vendor contract administration
• IV&V Reports Submitted
• Prepare and present project certification documentation – closeout phase
• Lessons learned
• Closeout activities
• Final IV & V Report
• Project Closeout Presentation |

4.1.1 PROJECT MANAGEMENT DELIVERABLES
Project Deliverables are work products or artifacts that are driven by the project management methodology requirements and standard project management practices regardless of the product requirements of the project.

4.1.1.1 Project Charter

| Description – The initial project deliverable plan will contain the Project Charter. This deliverable may be revised during planning phase. | Deliverable Acceptance Criteria – Sign-off by Project Sponsor or Project Director
Standards for Content and Format – Use of DoIT Project Charter template
Quality Review – Peer review for grammar and spelling
Key project team members review for consensus |

4.1.1.2 Project Management Plan

| Description – The Project Management Plan will be the guide used throughout the Project. This plan will contain the following plans: Scope Management, | Deliverable Acceptance Criteria – Approval by Project Team and Steering Committee
Sign-off by Project Sponsor or Project Director
Standards for Content and Format – Use of DoIT Project Management Plan template |
Schedule Management, Budget, Risk Management, Communications, Change Management, Lessons Learned and Roles/Responsibilities of team members. This plan is an evolving document as new information will be added and existing information will be revised during initiation and planning phase.

Quality Review –
Peer review for grammar and spelling
Key project team members review for consensus
Final review by Steering Committee, Project Director and Sponsor

4.1.2 Deliverable Approval Authority Designations
Complete the following table to identify the deliverables this project is to produce, and to name the person or persons who have authority to approve each deliverable.

<table>
<thead>
<tr>
<th>Deliverable Number</th>
<th>Deliverable</th>
<th>Approvers (Who Can Approve)</th>
<th>Date Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRJ-DEL-001</td>
<td>Project Charter</td>
<td>Jane Peacock, Daniel Burke</td>
<td></td>
</tr>
<tr>
<td>PRJ-DEL-002</td>
<td>Project Management Plan (PMP)</td>
<td>Jane Peacock, Daniel Burke</td>
<td></td>
</tr>
</tbody>
</table>

4.1.3 Deliverable Acceptance Procedure
Describe the process that this project will use for the formal acceptance of all deliverables.

The Project Director and the Project Sponsor(s) will review and accept the project documents.

4.2 Product Life Cycle
“During the project management lifecycle, agencies shall select and implement a phase product development lifecycle methodology approved by the Department.” PROJECT OVERSIGHT PROCESS Memorandum

<table>
<thead>
<tr>
<th>Phase</th>
<th>Summary of Phase</th>
<th>Key Deliverables</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiation and Planning</td>
<td>Project scope of work and deliverables identified</td>
<td>Project Charter Project Management Contract</td>
</tr>
<tr>
<td></td>
<td>Definition of system requirements, work breakdown schedule</td>
<td></td>
</tr>
<tr>
<td>Design and Implementation</td>
<td>Implementation and</td>
<td>IV&amp;V Contract</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Configuration of project software, hardware, databases, and customizations including reports | Software and Implementation Contract  
Software Licenses  
Data Conversion Services  
Software Implementation Services |
|---|---|
| Testing and Training Plan | User acceptance testing (UAT)  
UAT Test Plans  
Delivery Sign Off Documents  
Training Documentation |
| Training and Deployment | Transition to operations in production environment  
Production Cutover Plan  
End user training  
System Documentation  
Conduct Training |
| Maintenance | Maintenance of new systems; project closeout and lessons learned  
Maintenance and support plan  
Annual maintenance agreements with vendors |

### 4.2.1 Technical Strategy

Discuss the key technical strategies for achieving success in this project.

- Ensure the product is sustainable by NMDOH IT Bureau
- Ensure the product’s usability by the stakeholders
- Ensure the product meets current and future immunization registry requests. NM

### 4.2.2 Product and Product Development Deliverables

Product Deliverables are work products or artifacts that are driven by the product management methodology requirements and standard project management practices regardless of the product requirements of the project.

#### 4.2.2.1 NMSIIS Implementation

| Description: | Deliverable Acceptance Criteria -  
Standards for Content and Format - |
4.2.3 Deliverable Approval Authority Designations

Complete the following table to identify the deliverables this project is to produce, and to name the person or persons who have authority to approve each deliverable.

<table>
<thead>
<tr>
<th>DELIVERABLE NUMBER</th>
<th>DELIVERABLE</th>
<th>APPROVERS (WHO CAN APPROVE)</th>
<th>DATE APPROVED</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.2.2.1</td>
<td>Implementation</td>
<td>TBD</td>
<td></td>
</tr>
</tbody>
</table>

4.2.4 Deliverable Acceptance Procedure

Describe the process that this project will use for the formal acceptance of all deliverables.

As part of the Deliverable Acceptance Procedure, the Project Team will review each of the deliverables. During the Project Team review period, any issues identified will be documented in the issue log and resolved if possible prior to the next step. After a deliverable is reviewed, a recommendation from the Project Team for acceptance will be created. A procedure for final sign-off will be created at time of contract award.

5.0 PROJECT WORK

5.1 Work Breakdown Structure (WBS)

A WBS is a deliverable-oriented grouping of project elements that organizes and defines the total work scope of the project. Describe the work activities that comprise the work breakdown structure (WBS) or the work packages within the WBS. Identify the WBS element or other work package identifier and provide a general description of the tasks or activities, the definition or objectives, and the milestones and deliverables of each work package.

Use the chart below for highest level presentation, and provide a more detailed WBS as an attachment to this project plan.
<table>
<thead>
<tr>
<th>Identifier</th>
<th>Work Package Description</th>
<th>Definition/Objective</th>
<th>Milestone/Deliverable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Initiation Phase</td>
<td>This phase defines overall parameters of the project and established the appropriate project management and quality environment required to complete the project</td>
<td>Project Charter, Initial Risk Assessment, High-level schedule, Approval for next phase.</td>
</tr>
<tr>
<td>2.0</td>
<td>Planning Phase</td>
<td>This phase identifies the implementation approach, procurement method and establishes all necessary documentation.</td>
<td>Contract Amendment Negotiated and Executed, IV&amp;V Contract Negotiated, Finalize PMP, Commit Resources. Approval for next phase.</td>
</tr>
<tr>
<td>3.0</td>
<td>Implementation Phase</td>
<td>This phase deploys the upgraded system to a prepared set of users and positions on-going support and maintenance.</td>
<td>Confirm Schedule, IV&amp;V Contract Executed Configuration, Testing, Training, and Deployment.</td>
</tr>
<tr>
<td>4.0</td>
<td>Closeout Phase</td>
<td>This phase closes out the project and completes the Transition to Production.</td>
<td>Closeout report, Transition to Production document, Lessons Learned</td>
</tr>
</tbody>
</table>

### 5.2 SCHEDULE ALLOCATION - PROJECT TIMELINE

The project timeline is a high-level view of project activities with a focus on project milestones. The project timeline does not replace the need for a detailed project schedule and it is to highlight key events such as deliverable due dates and when go/no-go decisions are made.

The table below should provide a high level view of the project timeline, or a summary-level Gantt chart can be used to meet the timeline requirement.

Please provide a more detailed project schedule as an attachment to this plan.

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Task/Activity Name</th>
<th>Resource Name</th>
<th>Milestone (Y/N)</th>
<th>Effort/Duration</th>
<th>Start</th>
<th>Finish</th>
<th>Dependent Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Initiation Phase</td>
<td>Project Director</td>
<td>Y</td>
<td>3 months</td>
<td>5/2015</td>
<td>8/2015</td>
<td>RFP Awarded</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Project Team</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.0</td>
<td>Planning Phase</td>
<td>Project Director</td>
<td>Y</td>
<td>4 months</td>
<td>08/2015</td>
<td>12/2015</td>
<td>RFP Award and Execute Vendor Contract</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Project Team</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.0</td>
<td>Implementation Phase</td>
<td>Project Director</td>
<td>Y</td>
<td>5 months</td>
<td>1/2016</td>
<td>5/2016</td>
<td>Completion of Planning Phase</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Project Team</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Vendor Resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
5.3 PROJECT BUDGET

Costs estimates are the costs applied to an activity in a project by assigning resources with associated rates or fees. Resources can include equipment, material, technology, processing cycles, or people. The total cost is critical and should be consistent with the proposal; include breakdowns as needed. Match these cost estimates with the actual billed amounts. Use an appropriate format for the project size and customer requirements (e.g., by WBS, milestone, or deliverable).

Envision Services:
- Mthly Support Services $ 58,987
- Development $ 17,600
- User Acceptance Testing $ 16,000
- Training the Trainer/materials $ 16,000
- Licensing/Cloud Setup $148,138
- Retainage $ 30,400

Total Envision Remaining Costs $287,125
Total Consulting Costs (IV&V, TekSystems) $130,160
Estimate to Complete $417,285
Paid to Date $183,478
Remaining Balance Plan Phase $166,522

**TOTAL Implementation Request:** $300,763
Est. Total Project Cost $600,763

5.4 PROJECT TEAM

5.4.1 PROJECT TEAM ORGANIZATIONAL STRUCTURE

Insert a graphical Organization Chart here. The Organizational Structure (OS) is a hierarchical configuration defining levels of program management and may identify all project personnel. The OS should be simple and straightforward. Include role names and people’s names. Consider identifying the core project team by shading their respective boxes on the chart. On complex projects, consider using a second OS to identify core project team. The OS can also be used for management reporting.
5.4.2 PROJECT TEAM ROLES AND RESPONSIBILITIES

List the team members, their role, responsibility and functional manager. Make sure to include a comprehensive listing including those from the organization managing the project, business members involved to ensure business objectives are met and the vendor members that may have a specific role.

<table>
<thead>
<tr>
<th>Resource</th>
<th>Cost Estimate</th>
<th>Estimated Hours</th>
<th>Availability</th>
<th>Skill Set</th>
<th>Work Product/Deliverable</th>
</tr>
</thead>
</table>

5.5 STAFF PLANNING AND RESOURCE ACQUISITION

Complete the chart below identifying the project team members and details concerning their project commitment. Project staff should include State, Contract, Customer (Business Owner), or Vendor team members.

5.5.1 PROJECT STAFF
<table>
<thead>
<tr>
<th>Resource</th>
<th>Cost Estimate</th>
<th>Estimated units/hours</th>
<th>Availability</th>
<th>Source</th>
<th>Work Product/Deliverable</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 5.5.2 Non-Personnel Resources

Use this section to list services or product (HW/SW and such) needed for project

<table>
<thead>
<tr>
<th>Resource</th>
<th>Cost Estimate</th>
<th>Estimated units/hours</th>
<th>Availability</th>
<th>Work Product/Deliverable</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBD</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 5.6 Project Logistics

Logistics describes how the project manager, project team, the business owner/customer and any vendor resources will physically work together. Include anything to do with moving or starting resources. Training specifically related to project team members should be included here.

**5.6.1 Project Team Training**

Describe training if any needed by project team members. This is not to include training for end users, system administrators or business owners; those should be handled within a training document or part of the transition to operations planning.

TBD (Dependent on RFP Award)
6.0 PROJECT MANAGEMENT AND CONTROLS

6.1 RISK AND ISSUE MANAGEMENT

PMBOK©:

Risk: “An uncertain event or condition that, if it occurs, has a positive or negative effect on a project’s objectives.”

Issue: “A point or matter in question or dispute, or a point or matter that is not settled and is under discussion or over which there are opposing views or disagreements.”

Both Risks and Issues can significant impact a project’s success, and both should be handled in similar ways.

6.1.1 RISK MANAGEMENT STRATEGY

Provide a detailed explanation on the strategy for how risks are identified, analyzed/quantified, mitigated, reported, escalated and tracked. Include the use of tools such as project management software, forms, and templates. A separate risk management plan may also be developed if needed for the project and included as an Appendix to this document. If that is the case, a high level summary of this plan needs to be included here with the specific reference.

The Project management plan will be entered into Microsoft Project and monitored weekly for issues/risks. The following table will be used to rate the issue/risk. The weekly project report will include the risk identification schema as shown below.

6.1.2 PROJECT RISK IDENTIFICATION

<table>
<thead>
<tr>
<th>Risk Description</th>
<th>Probability Levels:</th>
<th>Impact Levels:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Very High</td>
</tr>
<tr>
<td>Certain</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Expected</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Likely</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Possible</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Unlikely</td>
<td>5</td>
<td>1</td>
</tr>
</tbody>
</table>

Approach
We will follow the Risk Management Process below as suggested by DoIT:
## Risk Management Process

<table>
<thead>
<tr>
<th>Risk Processes</th>
<th>Risk Planning</th>
<th>Risk Identification</th>
<th>Risk Qualification</th>
<th>Risk Quantification</th>
<th>Risk Response</th>
<th>Risk Monitoring &amp; Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>Definition</td>
<td>Deciding how to approach and plan risk management activities</td>
<td>Determining which risk might affect the project</td>
<td>Analysis of risks and conditions to prioritize their effects</td>
<td>Measuring the probability and consequences of risks and estimating their implications</td>
<td>Developing procedures and techniques to enhance opportunities and reduce threats</td>
<td>Monitoring residual risks, identifying new risks, executing risk reduction plans, and evaluating their effectiveness</td>
</tr>
<tr>
<td>Tools &amp; Techniques</td>
<td>Planning Meetings, Document reviews, Assumption analysis, Checklists</td>
<td>Precision ranking, Probability/impact risk rating matrix</td>
<td>Interviewing</td>
<td>Avoidance, Mitigation, Acceptance, Transference</td>
<td>Risk Response Audits, Risk Review Meetings</td>
<td></td>
</tr>
<tr>
<td>Outputs</td>
<td>Risk Management Plan</td>
<td>Identified Risks, Triggers</td>
<td>Overall risk ranking, List of prioritized risks – high, medium, low</td>
<td>Prioritized list of quantified risk, Probabilistic analysis, Probability of achieving the cost and time objectives</td>
<td>Risk Response Plan – mitigation and contingency</td>
<td>Workaround Plan, Corrective action, Change Request, Updated Project Log, Updated Risk Form</td>
</tr>
</tbody>
</table>

### 6.1.4 Risk Reporting and Escalation Strategy

The regularly scheduled project report will include issue/risk identification for each item.

#### 6.1.5 Project Risk Tracking Approach

<table>
<thead>
<tr>
<th>Number</th>
<th>Risk</th>
<th>Probability</th>
<th>Impact</th>
<th>Rating</th>
<th>Contingency Plan</th>
<th>Mitigation Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Example</td>
<td>Certain</td>
<td>High</td>
<td>0.7125</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 6.1.6 Issue Management

From August 2015 through January 2016, a excel spreadsheet was used to map issues. Starting in February, issues are logged through the vendor’s Help Desk solution.
6.1.6.1 Internal Issue Escalation and Resolution Process

This internal process is provided for issues that involve project resources, processes, procedures, or methodology that should be resolved within the Division that is responsible for managing the project without affecting the overall project schedule, cost, or quality. This process should be used for improving project processes as the project is executed and where the implementation of such improvements should not be postponed to Lessons Learned during Project Close.

6.1.6.2 External Issue Escalation and Resolution Process

The external process is provided for issues that involve project resources, processes, procedures, or methodology that cannot be resolved within the Division that is responsible for managing the project without affecting the overall project schedule, cost, or quality.

6.2 INDEPENDENT VERIFICATION AND VALIDATION - IV&V

Independent Verification and Validation (IV&V) means the process of evaluating a system to determine compliance with specified requirements and the process of determining whether the products of a given development phase fulfill the requirements established during the previous stage, both of which are performed by an organization independent of the development organization. Describe the process that will be employed to meet IV&V requirements.

Independent Verification and Validation (IV&V) is a risk mitigation strategy designed to provide management with project oversight through an independent evaluation of a project’s product and process quality. The project has adopted a low risk implementation strategy by upgrading an existing application with a well-established and tested version. The IV&V plan will be tailored to address the unique risks associated with the upgrade.

The IV&V plan will:

1. Evaluate and validate that products and deliverables of a given development phase fulfill the requirements and performance outcomes set forth in the scope and project plan.
2. Provide a “close-out” report to the Steering Committee at the end of project

Specific deliverables from the IV&V contract:

- IV&V Project Management Plan.
- Initial Review and Risk Assessment.
- Periodic Review
- Close-out Report

6.3 SCOPE MANAGEMENT PLAN

Describe the process that is going to be used to manage the scope of the project. Make sure to address managing stakeholder expectations.
Most changes to scope are requests that add, change, or delete project objectives or deliverables. Changes in scope, if at all possible, will be avoided and any new objectives and/or deliverables deferred to a follow-on project. Any proposed changes in scope will be analyzed for impacts on the project including schedule, budget and quality. The findings will be presented to the Steering Committee for approval or rejection.

6.3.1 Change Control

6.3.1.1 Change Control Process

Change Control establishes how change will be managed, including capturing, tracking, communicating, and resolving change. Due to much ambiguity regarding change, it is vital that we document and discuss the change process with the executive sponsor.

Project changes will follow a decision making process. These changes include modifications to scope, schedule, budget, and quality. Significant changes of these planning components will be reviewed and approved or disproved by the Steering Committee. If a modification or enhancement to the project has been identified, a change request form will be completed. The Steering Committee will review the request to determine impacts to scope, schedule, budget, quality and resources. The Steering Committee will recommend accepting the change, rejecting the change, or may request additional information. The request will be documented by the Project Manager and if the change is approved, appropriate changes will be made to the Project Management Plan and other project documentation.

6.3.1.2 Change Control Board (CCB)

Insert a graphic or textual description identifying the Change Control Board (or function) for this project. The CCB may be an individual or group of individuals authorized to approve changes to the project plan.

During the course of the NMSIIS Hosting, Support, and Maintenance Project, the Steering Committee will fill the role of the Change Control Board.

6.4 Project Budget Management

Costs estimates are the costs applied to an activity in a project by assigning resources with associated rates or fees. Resources can include equipment, material, technology, processing cycles, or people. The total cost is critical and should be consistent with the proposal; include breakdowns as needed. Match these cost estimates with the actual billed amounts. Use an appropriate format for the project size and customer requirements (e.g., by WBS, milestone, or deliverable).

6.4.1 Budget Tracking

Costs estimates are the costs applied to an activity in a project by assigning resources with associated rates or fees. Resources may include equipment, material, technology, processing cycles, or people. The total cost is critical and should be consistent with the proposal and include breakouts per category as needed. The Project Manager will verify these cost estimates and proposed amounts with the actual billed amounts.

6.5 Communication Plan
Communication planning involves determining the information and communication needs of the stakeholders, executive sponsors, project team and others as needed. The communication plan needs to address who needs what information, when they will need it, how it will be given to them, and by whom. The complexity of the project may require a separate communication plan; however a high level summary of that plan will need to be included here and a reference made to the appropriate Appendix.

6.5.1 COMMUNICATION MATRIX

<table>
<thead>
<tr>
<th></th>
<th>Meetings</th>
<th>Status Reports</th>
<th>Other Communications</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Executive Sponsor</td>
<td>Monthly</td>
<td>Monthly</td>
<td>As Needed</td>
</tr>
<tr>
<td>To Steering Committee</td>
<td>Monthly</td>
<td>Monthly</td>
<td>As Needed</td>
</tr>
<tr>
<td>To Project Director</td>
<td>Bi-Weekly</td>
<td>Bi-Weekly</td>
<td>As Needed</td>
</tr>
<tr>
<td>To Project Team</td>
<td>Bi-Weekly</td>
<td>Receive From Members</td>
<td>As Needed</td>
</tr>
<tr>
<td>To Stakeholders</td>
<td>As Requested</td>
<td>As Requested</td>
<td>As Needed</td>
</tr>
</tbody>
</table>

6.5.2 Status Meetings
Status Meetings with the core project team will be held on a regular basis. This will include the project manager, project director and vendor project manager. Project Status will be the first agenda item. If needed, special meetings will be called to discuss and address issues.

6.5.3 PROJECT STATUS REPORTS
Project Status Reports which include reports from the Vendor will be distributed to the Project Sponsor and the Project Director and will be presented at each Steering Committee Meeting. These status reports will be rolled up into the Steering Committee status report and reviewed at each meeting.

The monthly DoIT Status Report will be completed by the Project Manager and submitted per the DoIT process.

6.6 PERFORMANCE MEASUREMENT (PROJECT METRICS)

The Project Manager and Executive Sponsor define the project metrics that will be used to control the project. Each project will need to have an established metrics program. Metrics are collected for measuring the progress of a project against its planned budget, schedule, resource usage, and error rates, and of establishing a historical database, which will aid in planning and forecasting future projects. At a minimum metrics must be established for time (schedule), cost (budget) and quality.

6.6.1 BASELINES

<table>
<thead>
<tr>
<th>Project Area</th>
<th>Category</th>
<th>Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBD</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
6.6.2 Metrics Library
The reviewed metrics in various software programs will be versioned by date and saved to the Project Library.

6.7 QUALITY OBJECTIVES AND CONTROL

Quality Management includes the processes required to ensure that the project will satisfy the needs for which it was undertaken. It includes all activities of the overall management function that determine the quality policy, objectives, quality assurance, quality control, and quality improvement, within the quality system. If a separate Quality Plan is used, include a high level summary in this document and refer to the appropriate appendix.

6.7.1 QUALITY STANDARDS

Describe the agency, industry or regulatory project performance standards that will be followed and assessed by the project. These quality standards will be used to assess whether the quality objectives were achieved.

Identify each of the project quality standards that are directly related to the project and not to the performance of the actual product and/or service. For each quality standard, identify the tracking tool or measure such as number of project reviews or Project Status.

<table>
<thead>
<tr>
<th>No.</th>
<th>Quality Standard</th>
<th>Tracking Tool or Measure</th>
</tr>
</thead>
</table>
| 1   | Project management plan approved and followed | • PMP signed off by Steering Committee  
|     |                                  | • Project status reports                     |
| 2   | Certification to proceed to next phase by DoIT | • Approval from DoIT Project Certification Committee and release of funds |
| 3   | Project risks documented, mitigated and tracked | • Risk Management Log                        |
| 4   | Project issues documented, tracked, and worked to resolution | • Issue Log                                 |
| 5   | Project is within budget                       | • Project status  
|     |                                  | • Budget management                         |
6.7.2 PROJECT AND PRODUCT REVIEW AND ASSESSMENTS

<table>
<thead>
<tr>
<th>Review Type</th>
<th>Quality Standard</th>
<th>Tools</th>
<th>Reviewer</th>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requirements</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plans</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Milestones</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Testing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6.7.3 AGENCY/CUSTOMER SATISFACTION

The project manager should assess the on-going sense of the customer agency about how they feel the project is going, and how team members are acting on the project. This feedback would be helpful to the success of the project and the professional growth of the project team members.

Examples:

<table>
<thead>
<tr>
<th>Areas of feedback</th>
<th>When</th>
<th>How Often</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency awareness</td>
<td>Feedback from the NMDOH PHD employees and end-users</td>
<td>Monthly</td>
</tr>
<tr>
<td>Quality of communications</td>
<td>Feedback during the various meetings</td>
<td>At Project Team meetings and Steering Committee meetings; other meetings when held</td>
</tr>
<tr>
<td>Manages project tasks</td>
<td>Feedback from Project Sponsor, Steering Committee, Project Director</td>
<td>Monthly</td>
</tr>
<tr>
<td>Productive Meetings</td>
<td>Feedback from Project Sponsor, Steering Committee, Project Director, Project Team, Testers, Training Attendees, Deployment Users</td>
<td>Monthly and per phase of the project</td>
</tr>
</tbody>
</table>
6.7.4 PRODUCT DELIVERABLE ACCEPTANCE PROCESS
How the client takes procession of the product. Delivery of media; manuals; contracts; licenses; services agreements; configuration settings; status of patches to COTS products; in-house or vendor developed code; test cases, routines, and scripts; and other items required to operate the product.

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Final Approval Process</th>
<th>Customer Acceptance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Azure Government Cloud Set-up</td>
<td>Review and approval by Erica Martinez and Sharon Zuidema</td>
<td>Meets contract requirements</td>
</tr>
<tr>
<td>3 year license for WebIZ</td>
<td>Review and approval by Erica Martinez and Sharon Zuidema</td>
<td>Meets contract requirements</td>
</tr>
<tr>
<td>Azure Government Cloud Hosting</td>
<td>Review and approval by Erica Martinez and Sharon Zuidema</td>
<td>Meets contract requirements</td>
</tr>
<tr>
<td>Development/Implementation</td>
<td>Review and approval by Erica Martinez and Sharon Zuidema</td>
<td>Meets contract requirements</td>
</tr>
<tr>
<td>User Acceptance Testing document</td>
<td>Review and approval by Erica Martinez and Sharon Zuidema</td>
<td>Meets contract requirements</td>
</tr>
<tr>
<td>WebIZ Training &amp; Materials</td>
<td>Review and approval by Erica Martinez and Sharon Zuidema</td>
<td>Meets contract requirements</td>
</tr>
<tr>
<td>Production Release/Go-live</td>
<td>Review and approval by Erica Martinez and Sharon Zuidema</td>
<td>Meets contract requirements</td>
</tr>
<tr>
<td>Technical Support</td>
<td>Review and approval by Erica Martinez and Sharon Zuidema</td>
<td>Meets contract requirements</td>
</tr>
</tbody>
</table>

6.8 CONFIGURATION MANAGEMENT
Configuration Management determines how project information (files, reports, designs, memos, documents, etc.) will be managed (tracked, approved, stored, secured, accessed, version control, etc.) and owned by (e.g., Agency managing the project or the Customer). Standards and team awareness are critical.

6.8.1 VERSION CONTROL
Documents will be stored on the NMDOH SharePoint server in a NMSIIS RFP Project Folder. If a document needs to be changed or updated, the document must be saved and renamed. After changes or updates are made, the renamed document is saved to the project shared folder. Larger documents such as the Project Management Plan will be controlled by the revision history log. Entries will be made into the revision history log when changes are made. A copy of the Project Library will be placed on a PHD share drive on a monthly basis.
6.8.2 Project Repository (Project Library)

“Provide to the Department all project management and product deliverables. Deliverables shall include but not limited to the project plan, project schedule, initial and periodic risk assessments, quality strategies and plan, periodic project reports, requirements and design documents for entire project. The lead agency must make available all deliverables in a repository with open access for the Department to review” PROJECT OVERSIGHT PROCESS Memorandum.

The NMSIIS RFP Project will have a folder on a PHD share drive and on the NMDOH SharePoint server for all project documentation.

6.9 Procurement Management Plan

Projects often have some element of procurement, i.e. the requirement to purchase goods and/or services from outside the organization. The procedures to be used to handle these procurements should be included here. Activities such as a make-or-buy analysis; writing requirements; solicitation planning, evaluation and selection; inspection and acceptance; contract closeout should all be included.

The NMSIIS RFP Project will be accomplished using an RFP that was published and bid on by various Vendors. The procurement will follow the State Purchasing Division’s process and protocol.

The IV&V vendor will be procured executing a contract against a statewide price agreement.

7.0 Project Close

Project Close will always consist of administrative project activities and possibly contractual project activities and an external vendor is employed. Completing both sets of activities is a mandatory step in the project life cycle. Administrative activities complete the internal needs for the Agency/Unit that is responsible for managing the project, such as lessons learned, recording the last hours against the project, and providing transition for the staff to other assignments. Contractual activities meet the contractual needs, such as executing a procurement audit and formal acceptance of the project work products.

Project Close consists of administrative project activities and contractual project completion activities. It is important for the proper project closeout to complete both sets of activities. Administrative closeout activities complete the agency requirements for the NMDOH who is responsible for managing the project. This includes developing the lessons learned, processing the last of the invoices, and providing a transition plan for system and staff to the production mode. Contract closeout activities complete the contracting requirements, such as the formal acceptance of the project work products and final invoice processing. Required documentation and presentations will also be completed.

7.1 Administrative Close

Administrative Close occurs at both the end of phase and end of project. This closure consists of verification that objectives and deliverables were met. Acceptance is formalized and phase activities are administratively closed out. Administrative closure occurs on a “by-phase” basis in accordance with the WBS and should not be delayed to project end. At that point, the burden of closing is too great and audits inaccurate. The specific project close activities for a given project are contingent on the project’s
complexity and size. Project managers should work with the project’s project management consultant to tailored Project Close procedures to compliment the project’s objectives

Administrative Close occurs at both the end of each phase and at the end of project. This closeout activity consists of verification that deliverables were met. Acceptance is formalized and phase activities are administratively closed out. The identification of closeout activities for the NMSIIS Hosting, Support and Maintenance Project will be the final deployment of the integration software and training of all levels of users. The final closeout will include the completion of NMDOH documentation, the DoIT closeout report and a presentation to the DoIT Project Certification Committee for approval to formally close the project

7.2 CONTRACT CLOSE

Contract close is similar to administrative close in that it involves product and process verification for contract close.

Contract closeout activities will include the verification of all contracting requirements, deliverables, and work products. It will also include confirming that all final invoices have been submitted for the Project.

ATTACHMENTS

Attachments are included for additional information, but are not formally considered part of the Project Plan for approvals and change management purposes. Examples

_Acronyms, abbreviations and definitions

This section contains definitions of terms used throughout this procurement document, including appropriate abbreviations:

“Agency” means the State Purchasing Division of the General Services Department or that State Agency sponsoring the Procurement action.

“Authorized Purchaser” means an individual authorized by a Participating Entity to place orders against this contract.

“Award” means the final execution of the contract document.

“Business Hours” means 8:00 AM thru 5:00 PM Mountain Standard or Mountain Daylight Time, whichever is in effect on the date given.

“Close of Business” means 5:00 PM Mountain Standard or Daylight Time, whichever is in use at that time.
“Contract” means any agreement for the procurement of items of tangible personal property, services or construction.

“Contractor” means any business having a contract with a state agency or local public body.

“Determination” means the written documentation of a decision of a procurement officer including findings of fact required to support a decision. A determination becomes part of the procurement file to which it pertains.

“Desirable” – the terms "may", "can", "should", "preferably", or "prefers" identify a desirable or discretionary item or factor.

“Distribution List” means the Agency list that includes the names of all Offerors who submit an Acknowledgement of Receipt form.

“Evaluation Committee” means a body appointed to perform the evaluation of Offerors’ proposals.

“Evaluation Committee Report” means a report prepared by the Procurement Manager and the Evaluation Committee for contract award. It will contain written determinations resulting from the procurement.

“Finalist” means an Offeror who meets all the mandatory specifications of this Request for Proposals and whose score on evaluation factors is sufficiently high to merit further consideration by the Evaluation Committee.

“Hourly Rate” means the proposed fully loaded maximum hourly rates that include travel, per diem, fringe benefits and any overhead costs for contractor personnel, as well as subcontractor personnel if appropriate.

“IIS” means Immunization Information System.

“Immunization Information System” means the electronic record keeping system for immunization records that encompasses software, hardware, network and database.
“Immunization Registry” means Immunization Information System.

“IT” means Information Technology.

“LPB” means local public body

“Mandatory” – the terms "must", "shall", "will", "is required", or "are required", identify a mandatory item or factor. Failure to meet a mandatory item or factor will result in the rejection of the Offeror’s proposal.

“Minor Technical Irregularities” anything in the proposal that does not affect the price quality and quantity or any other mandatory requirement.

“MMIS” means Medicaid Management Information System.

“Multiple Source Award” means an award of an indefinite quantity contract for one or more similar services, items of tangible personal property or construction to more than one Offeror.

“NMDOH” means the New Mexico Department of Health.

“NMSIIS” means the New Mexico Statewide Immunization Information System.

“Offeror" is any person, corporation, or partnership who chooses to submit a proposal.

“Price Agreement" means a definite quantity contract or indefinite quantity contract which requires the contractor to furnish items of tangible personal property, services or construction to a state agency or a local public body which issues a purchase order, if the purchase order is within the quantity limitations of the contract, if any.

“Procurement Manager” means any person or designee authorized by a state agency or local public body to enter into or administer contracts and make written determinations with respect thereto.

“Procuring Agency" means all State of New Mexico agencies, commissions, institutions, political subdivisions and local public bodies allowed by law to entertain procurements.
“Project” means a temporary process undertaken to solve a well-defined goal or objective with clearly defined start and end times, a set of clearly defined tasks, and a budget. The project terminates once the project scope is achieved and project acceptance is given by the project executive sponsor.

“Request for Proposals (RFP)” means all documents, including those attached or incorporated by reference, used for soliciting proposals.

“Responsible Offeror” means an Offeror who submits a responsive proposal and who has furnished, when required, information and data to prove that his financial resources, production or service facilities, personnel, service reputation and experience are adequate to make satisfactory delivery of the services, or items of tangible personal property described in the proposal.

“Responsive Offer” or means an offer which conforms in all material respects to the requirements set forth in the request for proposals. Material respects of a request for proposals include, but are not limited to price, quality, quantity or delivery requirements.

“SPD” means State Purchasing Division of the New Mexico State General Services Department.

“Staff” means any individual who is a full-time, part-time, or an independently contracted employee with the Offerors’ company.

“State (the State)” means the State of New Mexico.

“State Agency” means any department, commission, council, board, committee, institution, legislative body, agency, government corporation, educational institution or official of the executive, legislative or judicial branch of the government of this state. “State agency” includes the purchasing division of the general services department and the state purchasing agent but does not include local public bodies.

“State Purchasing Agent” means the director of the purchasing division of the general services department.

“VTrckS” means the Vaccine Tracking Management System as defined by the U.S. Center for Disease Control (CDC).
“WIR” means the Wisconsin Immunization Registry.

“WSCA” means Western States Contracting Alliance.