

# AHCA Florida Health Care Connections (FX)

Enter Full Project Name (Enter  
Project Acronym)

## Project Management Plan

**Version:** 000

**Date:** <Insert Deliverable Draft or Final Submittal Date as Month Day,  
Year>

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**Submitted To:** AHCA FX Project Management





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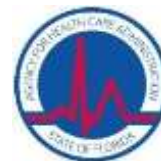
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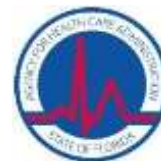
## Revision History

DATE	VERSION	DESCRIPTION	AUTHOR
MM/DD/YYYY	001	Enter Project Acronym Project Management Plan Development Draft Version (Entry)	Your name here
MM/DD/YYYY	002	Enter Project Acronym Project Management Plan Final Draft Version (Entry)	Your name here
MM/DD/YYYY	100	Enter Project Acronym Project Management Plan Approved Baseline Version (Entry)	Your name here

Modifications to the approved baseline version (100) of this artifact must be made in accordance with the Change Control process that is part of the Scope Management Plan.

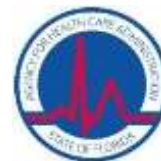
## Quality Review History

DATE	REVIEWER	COMMENTS
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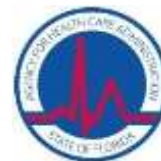


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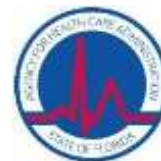
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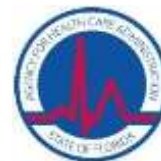
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## SECTION 1 INTRODUCTION

### 1.1 PURPOSE OF THE PROJECT MANAGEMENT PLAN

The Project Management Plan (PMP) is a *living* document that is prepared during the Planning Phase of the project. The PMP identifies key elements of the project management strategy and explains how the Enter Full Project Name (Enter Project Acronym) Project Team shall perform project activities in accordance with standards. The PMP provides the:

- Business Need for the Project
- Scope of the Project
- Project Outcomes and Benefits
- Critical Success Factors
- Project Assumptions and Constraints
- Project Organization and Roles and Responsibilities
- Project Governance
- Scope Management Plan
- Schedule Management Plan
- Cost Management Plan
- Quality Management Plan
- Change Management Plan
- Risk Management Plan
- Action Item Management Plan
- Issue Management Plan
- Decision Management Plan
- Lessons Learned Management Plan
- Communications Management Plan
- Project Stakeholder Management Plan
- Document Management Plan
- Resources Management Plan
- Outcome and Benefits Management Plan

While the above subsidiary plans detail how the project will be managed, monitored, and controlled, other artifacts necessary for managing the project as listed in the Project Process Agreement (PPA) are external to this document. Examples of other external artifacts:



- Project Charter
- Enter Project Acronym Project Schedule
- Organization Change Management Plan
- System Security Plan
- Release Plan
- Test Plan
- Risk Log
- Training Plan

This document will be stored with all other project artifacts on the FX Projects Repository for key project stakeholders to reference as necessary. At a minimum, this document will be reviewed and updated (if appropriate) quarterly or in response to an approved change.

## 1.2 BUSINESS NEED FOR THE PROJECT

The purpose of this project is to <Summarize the business need the project is going to address. Inputs may include the business case and other materials from the Portfolio Management process, the Legislative Budget Request, the contract, and Project Charter.

Summarize the intended outcomes and benefits of the project.>

## 1.3 SCOPE OF THE PROJECT

### 1.3.1 SCOPE STATEMENT

The scope of the project is to <Detail the product or service to be delivered at the project completion. The Scope Statement provides a documented basis for making project decisions and for confirming a common understanding of the project.>

### 1.3.2 OUT-OF-SCOPE

What is out-of-scope is just as important as what is in scope. Project exclusions help to maintain stakeholder expectations. The following are considered out-of-scope for the Enter Project Acronym Project:

- <Clearly state what is out-of-scope for this project>
- <Clearly state what is out-of-scope for this project>

### 1.3.3 PROJECT DELIVERABLES AND/OR MILESTONES

The project shall complete the following deliverables and/or milestones in accordance with <Contract or Task Order XXX-###>:



<List the project deliverables as defined in the contract and project milestones.

**Note:** A Deliverable Expectations Document shall be completed and reviewed with the Agency and the SEAS Vendor.>

#### **1.3.4 ACCEPTANCE CRITERIA**

<Document product and/or deliverable acceptance criteria here or reference the appropriate Deliverable Expectations Document.>

#### **1.4 PROJECT OUTCOMES AND BENEFITS**

The Enter Project Acronym Project was chartered to achieve the following outcomes and benefits:

<List the outcomes and benefits identified during the Portfolio Management process.>

#### **1.5 CRITICAL SUCCESS FACTORS**

The following conditions must exist for the project to be successful: <Examples may include, and are not limited to:

- *Strong alignment of project objectives with agency strategic plan*
- *Executive support*
- *Proper mix of expert resources*
- *Strong collaboration with key stakeholders*
- *Effective communications>*

#### **1.6 PROJECT ASSUMPTIONS AND CONSTRAINTS**

##### **1.6.1 ASSUMPTIONS**

Assumptions are factors in the planning process considered to be true. Plans will be inaccurate when assumptions are untrue. The following assumptions are factored into the planning of the Enter Project Acronym Project:

- <Assumption 1
- Assumption 2
- Assumption 3
- Assumption N>



## 1.6.2 CONSTRAINTS

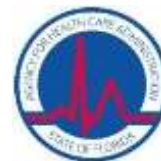
Constraints are limiting factors that will affect the execution of the project. The following constraints are factored into the planning of the project:

- <Constraint 1
- Constraint 2
- Constraint 3
- Constraint N>

## 1.6.3 PROJECT APPROACH

<Each project team shall determine their strategy for producing the required deliverables/work products and describe here. It should be noted that the Agency generally prefers Waterfall. Project Schedule Templates have been developed accordingly.>

<Define Project Approach Here>



## SECTION 2 PROJECT ORGANIZATION AND ROLES AND RESPONSIBILITIES

The Enter Project Acronym Project Team is responsible for the execution of work in accordance with the PMP.

**Exhibit 2-1: Project Team Roles and Responsibilities** below depicts the roles and responsibilities required for the execution of the Enter Project Acronym PMP. The subsidiary plans identify their respective roles and responsibilities. If there are any new staffing requirements this PMP will be updated in accordance with the Quality Management approach described in this document.

<Note: Typical project team roles and responsibilities are provided below. Update the table below to meet the unique needs of the Enter Project Acronym Project.>

ROLE	RESPONSIBILITY
Project Sponsor	<ul style="list-style-type: none"><li>▪ Responsible for project alignment with the FX vision and strategy</li><li>▪ Responsible for meeting the project's vision, goals, and objectives</li></ul>
Project Director or Manager	<ul style="list-style-type: none"><li>▪ Responsible for completing and executing a Project Management Plan that adheres to the Standards</li><li>▪ Executing defined processes in alignment with the FX EPMO integrated processes</li><li>▪ Adhere to compliance requirements detailed in the Standards</li><li>▪ Responsible for communicating and executing changes and tracking risks, issues, decisions, and lessons learned according to the Standards and integrated processes</li><li>▪ Responsible for Enter Project Acronym meeting (i.e., status, risk) facilitation</li></ul>
<Complete table with other applicable project roles and responsibilities>	<ul style="list-style-type: none"><li>▪ &lt;Add responsibilities as applicable&gt;</li></ul>

**Exhibit 2-1: Project Team Roles and Responsibilities**



## SECTION 3 PROJECT GOVERNANCE

This section articulates the project-governing framework and the roles and responsibilities of the distinct governing bodies. It describes the key stakeholder groups for the project and defines the decision-making levels and appropriate escalation paths.

### 3.1.1 ENTER PROJECT ACRONYM PROJECT GOVERNANCE STRUCTURE

The Enter Project Acronym Project governance structure has five decision-making tiers:

- **Level 1 – Enter Project Acronym Project Team:** The Enter Project Acronym Project Team has day-to-day decision-making authority within their respective subject matter area so long as the decision doesn't impact scope, schedule, cost, other teams, or overturn a decision.
  - › **Escalation to Level 2:** If the Enter Project Acronym Project Team cannot resolve a matter affecting project resources, work, or outcomes within two (2) days, it should be escalated to the Enter Project Acronym Project Manager.
- **Level 2 – Enter Project Acronym Project Manager:** The Enter Project Acronym Project Manager has day-to-day decision-making authority over the project so long as there is no impact to scope, schedule, cost, shared resources, or overturn a decision. The Project Manager should be consulted for matters which span intra- and inter-project teams. Decisions impacting shared resources shall be escalated to the FX EPMO for coordination of inter-project dependencies.
  - › **Escalation to Level 3:** If the matter has any potential impact to the schedule's critical path, scope, or budget, the Enter Project Acronym Project Manager shall initiate a Project Change Request (PCR), including impact analysis (in accordance with the FX Governance Plan) and escalate to the Enter Project Acronym Project Sponsor.
- **Level 3 – Enter Project Acronym Project Sponsor:** The Enter Project Acronym Project Sponsor has project ownership and provides leadership to the team regarding the strategic direction of the project. The Enter Project Acronym Project Sponsor has programmatic responsibility for the successful implementation of the project. The Enter Project Acronym Project Sponsor is assigned by, and reports project status to, Program Governance. The Enter Project Acronym Project Sponsor can make decisions if there is no impact to the project scope, cost, or outcome or benefits realization.
  - › **Escalation to Level 4 or 5:** If a decision or issue exceeds the decision-making purview of the Enter Project Acronym Project Sponsor, or the project seeks to baseline the schedule, the Enter Project Acronym Project Manager shall notify the FX EPMO. The FX EPMO shall facilitate discussion towards resolution or approval as set forth in the FX Governance Plan.
- **Level 4 – Program Governance:** The Program Governance Committee approves project charters, provides decision-making authority for high impact concerns regarding project schedules, scope, cost, quality, or outcomes.



- **Level 5 – Executive Governance:** The Executive Governance Committee sets the strategic direction of FX efforts by authorizing projects through the FX Portfolio Management process and reviewing decisions with portfolio-level impacts (e.g., changes to project outcomes).

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## SECTION 4 SCOPE MANAGEMENT PLAN

The Scope Management Plan describes how the scope of the Enter Project Acronym Project will be baselined and managed. This section includes:

- Process of developing and approving scope baseline
- Project Scope Statement
- Project Work Breakdown Structure (WBS)
- Process for validating scope
- Process for controlling scope

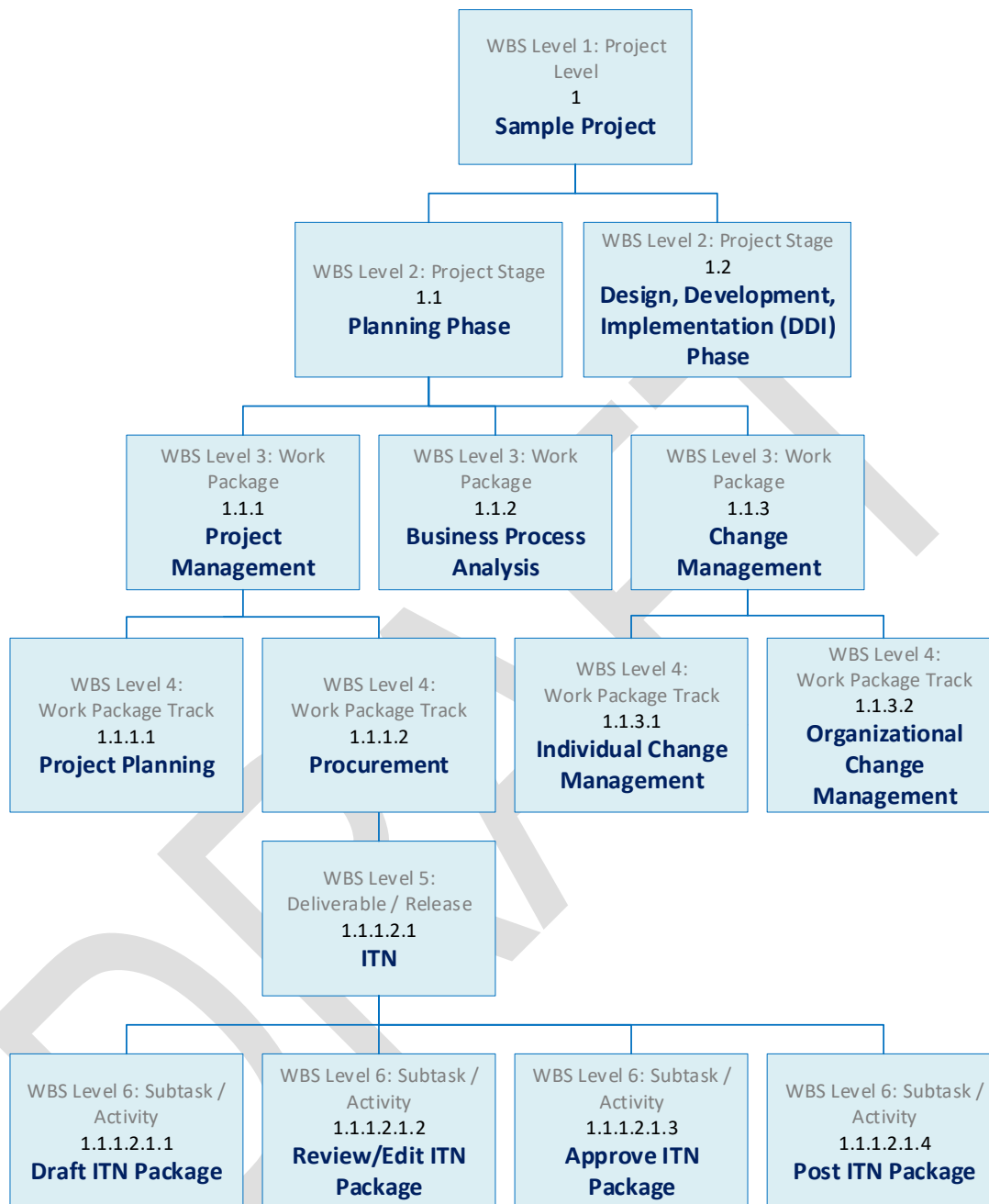
### 4.1 DEVELOPING AND APPROVING SCOPE BASELINE

The FX Project life cycle anticipates iterative refinement of the scope and schedule. The initial Enter Project Acronym Project Scope Statement is included in the Project Charter approved on [Month Day, Year](#). The Scope Statement in Section 1.3.1 of this PMP is the elaboration of the initial Scope Statement based on new information acquired since the Project Charter was approved (e.g., through discovery and WBS sessions). With approval of this PMP, it will become the scope baseline.

#### 4.1.1 WORK BREAKDOWN STRUCTURE (WBS)

The Enter Project Acronym Project Team shall develop and use a WBS chart during the Planning Phase to identify and decompose the project scope to confirm 100% of the work is captured—to the best of the team's knowledge at the time and subject to progressive elaboration.





**Exhibit 4-1: Example Work Breakdown Structure**

The Enter Project Acronym Project schedule shall incorporate all tasks required to complete the entire scope of work for the project according to the following WBS Framework in the FX Project Management Standards.



WBS LEVEL	WBS LEVEL NAME	WBS LEVEL EXPLAINED
1	▪ Project Level	▪ The Project Summary Task, which represents 100% of the project's scope of work.
1.x	▪ Project Stages	▪ Separates project work into distinct project management process groups, as follows: <ul style="list-style-type: none"> <li>› Project Management</li> <li>› Initiation</li> <li>› Planning</li> <li>› Execution</li> <li>› Close Out</li> </ul>
1.x.x	▪ Work Package	▪ Separates each phase (process group) into individual work packages with estimated work (e.g., Business Process Analysis, Development, etc.).
1.x.x.x	▪ Work Package Track	▪ Further organizes work of individual work packages into separate tracks or workstreams.
1.x.x.x.x	▪ Deliverable ▪ Release	▪ <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	▪ Subtask/Activity	▪ <u>Task / Activity</u> : Identifies the tasks and activities required to plan and develop each deliverable.

#### Exhibit 4-2: Work Breakdown Structure Framework

The Enter Project Acronym Project developed the WBS using the <top-down and/or bottom-up> approach.

<If applicable, the Go-Live readiness assessment (template found on the FX Projects Repository) will use the scope baseline to determine if all final project and/or product requirements have been met prior to Go-Live>. The Project Close Out Report will describe the extent to which the Enter Project Acronym Project Team delivered the required scope.

#### 4.2 VALIDATE SCOPE

<Depending on the project type, the scope will be validated through work product or deliverable review or Go-Live readiness assessment, using the documented acceptance criteria, requirements traceability matrix, and other project artifacts.

Use this section to document the method that will be used to validate scope.>

#### 4.3 MONITOR AND CONTROL SCOPE

The scope baseline shall be maintained and monitored as project work progresses. This PMP, specifically the Scope of the Project section, the WBS, <requirements, if applicable> and the CRAIDL (Changes, Risks, Action Items, Decisions, and Lessons Learned) logs shall be considered regularly as part of monitoring scope.



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Any proposed change to the scope baseline shall be assessed for full project impact, and change request logged by the Enter Project Acronym Project Manager and evaluated by the Project Sponsor and Governance Committee in accordance with the Governance Plan.

The Change Control Process shall be followed as described in the Change Management Plan section.

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## SECTION 5 SCHEDULE MANAGEMENT PLAN

### 5.1 SCHEDULE MANAGEMENT OVERVIEW

The Schedule Management Plan explains how the Enter Project Acronym Project Team shall develop and manage the project schedule. It also identifies applicable schedule templates, the process for submitting the schedule for review and baselining, progressively elaborating the schedule, processes for submitting and approving changes to the schedule and to the schedule baseline, and ongoing updating and controlling requirements.

The Schedule Management Plan also describes how the project will address variance from baselined schedule parameters, including processes for triggering and implementing corrective actions to restore the schedule to its baseline performance targets and to increase the probability the project will meet its objectives.

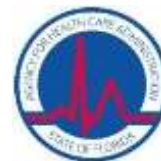
### 5.2 SCHEDULE MANAGEMENT SCOPE STATEMENT

This Schedule Management Plan includes the policies, procedures, and documentation as described in the following components:

- Development and management of the WBS
- Project-level resource planning, estimating, allocation, and utilization monitoring
- Initial planning and development activities for the creation of the project schedule
- Establishing and obtaining approval for the project schedule baseline
- Ongoing planning and development activities for the continuous elaboration of the project schedule
- Monitoring, controlling, and maintenance of the project schedule
- Process for weekly schedule updates including, at a minimum:
  - › Generating and analyzing schedule data for weekly and monthly project status reports (and other reports when required)
  - › Generating, analyzing, and reporting earned value metrics for tracking schedule performance against baseline parameters
  - › Schedule baseline control and analysis
  - › Schedule performance report descriptions

### 5.3 SCHEDULE MANAGEMENT ROLES AND RESPONSIBILITIES

The roles and responsibilities associated with developing the Enter Project Acronym Project schedule are listed in **Exhibit 5-1: Example Work Breakdown Structure** below.



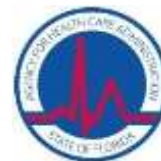
ROLE	RESPONSIBILITY
FX EPMO Schedule Manager	<ul style="list-style-type: none"> <li>Establish, maintain, and socialize schedule management standards, process definitions, and templates</li> <li>Recommend and document exceptions to the Standards on a case-by-case basis</li> <li>Develop and evaluate the continuous, recurring processes that represent the appropriate rigor for schedule management based on the phase or stage of the project               <ul style="list-style-type: none"> <li>Collect project schedules for analysis</li> <li>Collect schedule progress updates from Project Managers</li> <li>Facilitate analysis of schedule progress updates and changes</li> <li>Assess proposed schedule changes for adherence to schedule change management requirements defined in the FX Project Management Standards</li> <li>Provide schedule analyses to the Project Manager</li> <li>Facilitate program-level schedule and resource management discussions to resolve any schedule conflicts, or schedule-related risks, and issues</li> </ul> </li> <li>Perform quality control reviews of schedules prior to baselining, then during stage gates reviews or quarterly (whichever comes first) during the course of the project</li> <li>Maintain schedule management process documentation as needed</li> </ul>
Enter Project Acronym Project Manager	<ul style="list-style-type: none"> <li>Develop the initial WBS chart by working with the project team to graphically represent the complete scope of work</li> <li>Adhere to the FX Project Management Standards for schedule management to develop and maintain the schedule. This includes weekly updates to the schedule and documentation of the changes in the Schedule Release Notes</li> <li>Respond to questions from the FX EPMO Schedule Manager regarding schedule development, status, performance, and the frequency and accuracy of schedule updates</li> <li>Participate in schedule and resource management discussions to avoid or resolve schedule conflicts, risks, and issues</li> <li>Participate in schedule change meetings</li> <li>May propose changes to schedule management process documentation to the FX EPMO Schedule Manager</li> </ul>
Project Team members	<ul style="list-style-type: none"> <li>Contribute to the development of the WBS and project schedule by identifying, sequencing and estimating work to be performed</li> <li>Complete work according to baselined dates</li> <li>Notify Project Manager in advance if a task may not be completed by the deadline</li> </ul>
<Other applicable roles>	<Complete for additional entries as applicable>

**Exhibit 5-1: Example Work Breakdown Structure**

## 5.4 STANDARD SCHEDULE ACTIVITIES

### 5.4.1 REQUIRED ACTIVITIES

The following **Exhibit 5-2: Enter Project Acronym Schedule Management Activities** lists the required Schedule Management activities. The FX EPMO shall evaluate each of these processes on an ongoing basis for quality assurance and continuous improvement.



TASK	CYCLE / FREQUENCY	RESPONSIBILITY
Develop Project Schedule	Startup	<ul style="list-style-type: none"> <li>The Project Manager shall work with the project team to have the schedule ready for review by the FX EPMO &lt;(15 for Category 1 projects; up to 30 for DDI projects)&gt; business days of the Project Charter being approved</li> </ul>
Review Schedule with FX EPMO Schedule Manager for integrated schedule management and FX EPMO performs QC Review	Startup	<ul style="list-style-type: none"> <li>The Project Manager reviews the schedule (tasks) with FX EPMO Schedule Manager: review tasks, timelines, deliverables, and resources</li> <li>Confirm the schedule does not create conflict with other schedules, and identify interdependencies with other schedules</li> <li>The FX EPMO performs a schedule quality review. Findings must be addressed to receive approval to baseline</li> <li>The FX EPMO review includes setting a test baseline to assess schedule metrics at baselining. If SPI or CPI are below .93, the FX EPMO may advise the Project Manager to replan late tasks</li> </ul>
Refine Schedule	Startup	<ul style="list-style-type: none"> <li>The Project Manager updates proposed schedule based on feedback from FX EPMO Schedule Manager</li> </ul>
Review Schedule with Project Sponsor	Startup	<ul style="list-style-type: none"> <li>The Project Manager review the draft schedule with the Project Sponsor</li> </ul>
Baseline Schedule	Startup	<ul style="list-style-type: none"> <li>The Project Sponsor approves the final draft of the schedule. At this point, the project schedule may be baselined</li> </ul>
Meet with project stakeholders to capture project status updates	Weekly	<ul style="list-style-type: none"> <li>The Project Manager works with project team members and stakeholders to receive task updates in addition to any other information required to update the schedule and to generate required metrics</li> </ul>
Project Schedule updates	Weekly	<ul style="list-style-type: none"> <li>The Project Manager shall update the schedule on a weekly basis in accordance with the FX Project Management Standards</li> </ul>
Perform Project Status Reporting Process	Weekly	<ul style="list-style-type: none"> <li>The Project Manager includes schedule performance metrics in accordance with the FX Project Management Standards</li> </ul>
Facilitate schedule review meetings	Bi-weekly	<ul style="list-style-type: none"> <li>The FX EPMO Schedule Manager facilitates meetings with the Agency, Project Managers, and IV&amp;V to review overall schedule status and task-level information for all active project schedules</li> <li>The Project Manager provides schedule overall status and task-level status updates to the Agency and at the schedule review meetings</li> </ul>
Level Schedule Resources	Weekly	<ul style="list-style-type: none"> <li>The Project Manager reviews the resource allocation in the schedule and levels resources across tasks</li> </ul>
Program-level schedule monitoring and analysis	Weekly	<ul style="list-style-type: none"> <li>The FX EPMO Schedule Manager generates analysis of program-wide schedule performance using schedule metrics and data provided from all active FX Project schedules</li> </ul>
<Add tasks as appropriate>		<ul style="list-style-type: none"> <li>&lt; Complete for additional entries as applicable, or If none, delete this row&gt;</li> </ul>

### Exhibit 5-2: Enter Project Acronym Schedule Management Activities

## 5.5 SCHEDULE DEVELOPMENT AND MANAGEMENT APPROACH

The Enter Project Acronym Project Team shall adhere to the schedule development requirements and standards set forth in the FX Project Management Standards. The project team shall also use FX Schedule QC Checklist for developing and maintaining the project schedule.

### 5.5.1 SCHEDULE DEVELOPMENT

The schedule management approach is based on the PMBOK® project-planning framework. The following **Exhibit 5-3: Schedule Development and Management Process** provides an overview of the Schedule Management Planning processes.



**Exhibit 5-3: Schedule Development and Management Process**

The following inputs are used to develop the Enter Project Acronym Project schedule:

- <Contract or Task Order XXX-###>
- Project Process Agreement
- Project Charter
- Project Scope Statement
- Project WBS
- Resource Calendars
- Shared / Enterprise Resource Pool
- <Project Deliverable Expectations Documents>
- <other>

The Enter Project Acronym Project Team shall also adhere to the corresponding schedule development and management requirements in the FX Project Management Standards.

### 5.5.2 SCHEDULE TEMPLATES

Based on the approved Project Process Agreement (PPA), the Enter Project Acronym Project Team is using the <identify schedule template used> schedule template. The Enter Project Acronym Project Team shall also use the Schedule Quality Control (QC) Checklist to evaluate the schedule to confirm consistency and continuity with other FX Project schedules.



### 5.5.3 SCHEDULE RESOURCE ALLOCATION

The FX EPMO uses a shared resource pool to manage resource allocations across all FX Project schedules. Prior to assigning resources to the project schedule, the Enter Project Acronym Project Manager shall provide the FX EPMO Schedule Manager with a project staffing report containing the resource parameters required in the FX Project Management Standards. To ensure alignment with the FX Resource Pool, the Enter Project Acronym Project Manager shall follow the steps outlined in the *Process Definition for Schedule Resource Requests* when requesting resources for their project schedule. This process shall be followed during initial schedule development and for any new resource assignments that might be required during the project.

### 5.5.4 SETTING THE INITIAL SCHEDULE BASELINE

The Enter Project Acronym Project Team shall adhere to the schedule baseline requirements in the FX Project Management Standards.

### 5.5.5 SCHEDULE UPDATES

The Enter Project Acronym Project Team shall adhere to the corresponding schedule update requirements in the FX Project Management Standards and in the *Process Definition for Weekly Schedule Updates*.

### 5.5.6 SCHEDULE CHANGE CONTROL

Upon baselining the schedule, the Enter Project Acronym Project Team shall adhere to the Schedule Change Control, and Monitoring and Controlling Change sections in the FX Project Management Standards when making changes to the schedule beyond routine updates.

### 5.5.7 SCHEDULE REVISIONS

For schedule revisions, re-baselining, and updates to the current baseline, the Enter Project Acronym Project Team shall adhere to the schedule revision requirements in the FX Project Management Standards.

#### 5.5.7.1 SCHEDULE BASELINE REVISIONS (RE-BASELINING)

The Enter Project Acronym Project schedule may be re-baselined at stage gates specified in the baselined project schedule. If it is necessary to re-baseline the schedule outside of the specified stage gate periods, then the Enter Project Acronym Project Manager shall only re-baseline the schedule through an approved Project Change Request and adhere to the re-baselining requirements in the FX Project Management Standards.





#### **5.5.7.2 SCHEDULE UPDATES TO THE CURRENT SCHEDULE BASELINE**

For updates to the current schedule baseline (as needed for progressive elaboration or rolling wave planning), the Enter Project Acronym Project Team shall adhere to the corresponding requirements set forth in the FX Project Management Standards.

#### **5.5.8 ROLLING WAVE PLANNING**

The Rolling Wave schedule management approach to updating and iterating the Enter Project Acronym Project schedule includes the decomposition of high-level tasks into detailed tasks. The outcome of the process is the baselining of the updated and additional tasks with approval from the Agency. *<If the Rolling Wave approach is utilized for this project include the next sentence; if not, delete>* The Enter Project Acronym Project Team shall adhere to the Rolling Wave Planning requirements in the FX Project Management Standards.

#### **5.5.9 SCHEDULE ANALYSIS (CRITICAL PATH ANALYSIS)**

The Enter Project Acronym Project Team shall use the Critical Path Method (CPM) to predict project duration by analyzing which sequence of activities has the least amount of scheduling flexibility (the least amount of float). The Enter Project Acronym Project Manager shall use this analysis to review proposed schedule changes (and associated impacts and changes to the schedule's critical path) when the schedule is updated. The Enter Project Acronym Project Manager will also determine if a change to any given activity has impacted (either positively or negatively) a dependent activity or resource. The resulting analysis may be used to provide input either for a Project Change Request discussion or simply just for informational purposes.

The Enter Project Acronym Project Manager is responsible for monitoring the critical path. The Enter Project Acronym Project Team will also determine and report if any Project Change Request impacts the schedule's critical path or if such an impact presents an imminent risk.

#### **5.5.10 SCHEDULE VARIANCE**

Upon baselining the schedule, the Enter Project Acronym Project Team shall adhere to the corresponding requirements in the FX Project Management Standards. For risks and issues associated with schedule variance, the Enter Project Acronym Project Team shall adhere to the requirements in the Monitoring and Controlling CRAIDL section of the FX Project Management Standards, and the Risk Management Plan and Identify Issues sections of this PMP.

#### **5.5.11 MANAGING SCHEDULE RESOURCE ALLOCATIONS**

The Enter Project Acronym Project Manager shall monitor and control resource utilization at the project-level as part of the normal process of monitoring and controlling the project schedule and performing schedule updates. The Enter Project Acronym Project Manager shall adhere to the requirements in the corresponding section of the FX Project Management Standards. The Enter Project Acronym Project Manager shall follow the Monitoring and Controlling CRAIDL section in the FX Project Management Standards, and the Risk



Management Plan and Issue Management Plan sections of this PMP when faced with risk and issues related to resource allocations.

#### **5.5.12 MITIGATING SCHEDULE DELAYS**

Similarly, when mitigating schedule delays, the Enter Project Acronym Project Team shall follow the Mitigating Schedule Delays, as well as the Monitoring and Controlling CRAIDL sections in the FX Project Management Standards, and the Risk Management Plan and Issue Management Plan sections of this PMP.

#### **5.5.13 ARCHIVING THE ENTER PROJECT ACRONYM PROJECT SCHEDULE**

Upon approval from the Agency that all appropriate tasks in the Enter Project Acronym Project Schedule are complete, the Enter Project Acronym Project Manager shall follow the corresponding requirements in the FX Project Management Standards.



## SECTION 6 COST MANAGEMENT PLAN

### 6.1 COST MANAGEMENT

The Cost Management Plan summarizes the Enter Project Acronym Project's processes to manage cost:

- Cost Planning
- Cost Estimating
- Cost Controlling
- Cost Close Out

### 6.2 COST PLANNING

After completing the PMP, schedule baseline, and risk response planning, the Enter Project Acronym Project Team shall re-evaluate the project's estimated cost. The Enter Project Acronym Project Manager shall consider at a minimum the following when creating a detailed cost estimate:

- Enter Project Acronym Project Team Resources (using the rate card associated with the contract)
- Software/Hardware/Licensing
- Contractual fixed costs
- Risk Contingencies

#### 6.2.1 COST ESTIMATE

<Provide a table of summary cost components with estimated cost in a table here.>

The Enter Project Acronym Project Manager shall compare the estimated cost in the table above with preliminary budgeted cost approved by Governance; if there is a cost increase greater than 5%, the project shall submit a Project Change Request according to the Change Management Plan. <If contract is fixed price, include following sentence: The Enter Project Acronym Project operates under a fixed price contract; a contract amendment is required to change the contracted amount for vendor services. If the contract is time and materials, include the following sentence: The Enter Project Acronym Project operates under a time and materials contract; a revised Task Order is required to change project costs.>

#### 6.2.2 COST BASELINE

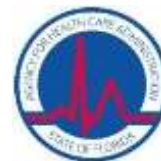
Once all allocations and estimates have been approved by the Agency, the project budget is baselined. The project budget baseline may only be changed according to the Change Management Plan.



### 6.3 COST CONTROLLING

The cost baseline will be maintained and assessed as work is iteratively evaluated. The Enter Project Acronym Project Manager shall monitor CPI trends weekly and actual costs at least monthly. The Enter Project Acronym Project Manager shall adhere to the cost management requirements in the FX Project Management Standards.

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## SECTION 7 QUALITY MANAGEMENT PLAN

### 7.1 OVERVIEW

The Quality Management Plan identifies the standards, processes, and tools the Enter Project Acronym Project Team will use to assure quality work is delivered and the Enter Project Acronym Project achieves the desired project outcomes. This plan also describes the responsibilities and authority for accomplishing quality activities and identifies the required coordination of quality management with other areas of the project.

### 7.2 ROLES AND RESPONSIBILITIES

**Exhibit 7-1: Quality Assurance Roles and Responsibilities** below describes the deliverable submission and review roles and responsibilities for implementing the Quality Assurance Plan.

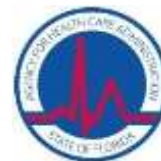
ROLE	RESPONSIBILITY
Enter Project Acronym Project Manager (PM)	<ul style="list-style-type: none"><li>Manage to standard performance metrics</li><li>Review and socialize schedule management standards</li><li>Coordinate the continuous, recurring process that represents the appropriate rigor for schedule management according to the FX Project Management Standards</li><li>Planning, analysis, development, implementation, execution, and maintenance of cost activities as required</li></ul>
Work Leads	<ul style="list-style-type: none"><li>Planning, analysis, development, implementation, execution, and maintenance of process quality activities as required</li></ul>
<Add other roles as appropriate>	<ul style="list-style-type: none"><li>&lt;Add corresponding responsibilities as appropriate&gt;</li></ul>

**Exhibit 7-1: Quality Assurance Roles and Responsibilities**

### 7.3 QUALITY MANAGEMENT APPROACH

Examples of where the Enter Project Acronym Project Team shall conduct quality activities to monitor, measure, and report include: <add to or remove from the list below as appropriate>

- Review of project delivery processes for appropriateness and accuracy
- Review of artifacts (e.g., project schedules, requirements documentation, reporting from FX tools)
- Review of end-to-end requirements traceability ensuring appropriateness and accuracy compliance
- Review of performance metrics
- Review of complete testing traceability, appropriateness and accuracy compliance to include both functional and non-functional testing
- Collection, review, and integration of project lessons learned

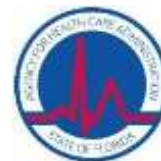


The Enter Project Acronym Project Team shall collaborate and communicate quality standards, measures, processes, and awareness to key project stakeholders as appropriate.

## 7.4 QUALITY PERFORMANCE METRICS

As part of the Enter Project Acronym Project Team's continuous assessment of project quality, risks, and overall project status, the Enter Project Acronym Project Manager shall use performance measures to monitor the project's progress and performance toward the completion of project milestones and for assessing trends in project health. The standard frequency for monitoring and reporting of project schedule metrics along with performance management metrics, reporting mechanisms, and acceptable values is detailed in **Exhibit 7-2: Performance Metrics** below.

METRIC / MODEL NAME	GOAL	QUESTION	FORMULA	ANALYSIS LEVEL, FREQUENCY	TARGET VALUES	ANALYSIS REPORTING
<b>% Complete</b> (Percent Duration Complete)	Determine project status based on percentage of its completed duration	How much time is needed to complete the project?	(Actual Duration / Total Planned Duration) x 100	Summary Task and Project Levels  Weekly  Monthly	Actual Duration Complete % is aligned with Planned Duration Complete %.	Project Status Report and/or Meeting
Percent Duration Complete expresses the current status of schedule activities as a percentage of the total scheduled duration that has been completed.						
<b>% Work Complete</b> (% Work Complete)	Determine project status based on percentage of its completed work	How much work is needed to complete the project?	(Actual Work / Total Planned Work) x 100	Summary Task and Project Levels Weekly  Monthly	Actual Work Complete % is aligned with Planned Work Complete %.	Project Status Report and/or Meeting
Percent Work Complete expresses the current status of schedule activities as a percentage of the total scheduled and assigned work (in resource hours) that has been completed.						
<b>Schedule Performance Index (SPI)</b>	On Target According to	Are we meeting our schedule?	Earned Value / Planned Value	Summary Task and Project	Between 0.90 and 1.10 with 1.00 as	Project Status Report



METRIC / MODEL NAME	GOAL	QUESTION	FORMULA	ANALYSIS LEVEL, FREQUENCY	TARGET VALUES	ANALYSIS REPORTING
	Scheduled Timeframe			Levels Weekly Monthly	the primary target. Above 1.00 is better than below 1.00.	and/or Meeting

Schedule Performance Index (SPI) is an Earned Value metric that measures whether the project is earning value at the scheduled rate. This metric can be used to assist Project Managers in determining if a project will be completed on time, assuming current trends continue.

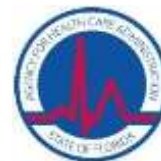
<b>Cost Performance Index (CPI)</b>	On Target According to Resource- Allocation	Are we utilizing our scheduled resources efficiently?	Earned Value / Actual Cost	Project Level Weekly Monthly	Between 0.90 and 1.10 with 1.00 as the primary target. Above 1.00 is better than below 1.00.	Project Status Report and/or Meeting
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Cost Performance Index (SPI) is an Earned Value metric that measures the cost-efficiency of work completed by scheduled resources. This metric can be used to assist Project Managers in determining if a project will be completed with its current-level of resource allocation, assuming current trends continue.

<b>Start Variance</b>	On Target According to Scheduled Start Dates	Are scheduled tasks starting as planned?	Current Scheduled Start Date – Baseline Start Date	Project Level Weekly Monthly	0.00. Below 0.00 is better than above 0.00.	Project Status Report and/or Meeting
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Start Variance determines the extent to which current scheduled Start Dates are aligned with Baseline Start Dates by measuring the time difference (in days) between an activity's Baseline Start Date and current scheduled Start Date.

<b>Finish Variance</b>	On Target According to	Are scheduled tasks being	Current Scheduled Finish	Project Level Weekly	0.00. Below 0.00 is	Project Status Report
----------------------------	---------------------------	---------------------------------	-----------------------------	-------------------------	---------------------------	-----------------------------



METRIC / MODEL NAME	GOAL	QUESTION	FORMULA	ANALYSIS LEVEL, FREQUENCY	TARGET VALUES	ANALYSIS REPORTING
	Scheduled Finish Dates	completed as planned?	Date – Baseline Finish Date	Monthly	better than above 0.00.	and/or Meeting

The *Finish Variance* field contains the amount of time that represents the difference between the baseline finish date of a task or project and its current *finish* date.

<b>Number of Open Risks</b>	Ongoing Monitoring and Control of Project Risks	Are risks being identified and mitigated?	Count of Open Project Risks	Project Level Weekly	Trend of total number on regular periodic basis	Project Status Report and/or Meeting
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Open risks are continuously monitored and addressed such that risks with high or increasing exposure values are stabilized, and the overall quantity of risks is decreasing.

<b>Overall Risk Exposure</b>	Mitigate and reduce overall project risk	Are risks being addressed and mitigated?	Sum of all Exposures (Probability x Impact) score for all open risks	Project Level Weekly	Trend of total exposure score on regular periodic basis	Project Status Report and/or Meeting
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Overall risk exposure looks at the project's risk posture according to its average Probability x Impact score for all open risks.

EAC (based on bottom-up ETC)	Project to complete within budget	Is the project able to complete <10% over BAC for remaining work	(AC + Bottom- up ETC)/BAC	When CPI <0.9	Value should be less than 1.1	Impact Analysis or Issue Log
------------------------------------	---	--	------------------------------	---------------	--	---------------------------------

Once CPI slips below acceptable threshold, an Estimate to Complete based on remaining scheduled work at the current pace will be performed to assess if there is a real issue.

## Exhibit 7-2: Performance Metrics

### 7.5 ANALYSIS AND CORRECTIVE ACTIONS

Quality Control is the process of reviewing the results of Quality Assurance activities and audits and performing root cause analysis where appropriate. This includes applying corrective actions and process improvements to the project's products, services, and processes.

The Enter Project Acronym Project Manager shall use the following rules to control the project when performance metrics become outside of standard thresholds. The first rule applies to all metrics.





- **Beyond Limits** – The current metric result is outside expected variance (from baselines, specifications, or thresholds), going by whichever set of limits is most strict.

The following rule applies only to time-based data (such as SPI), not to event-based data (such as peer review comments or QC checklist).

- **Trending in one direction** – The metric result has been trending in one direction for at least five times in a row for weekly items (with lower tolerance employed for longer reporting periods).

The Enter Project Acronym Project Team, during the project Planning Phase risk identification activity should take into account potential threats based on performance metrics, log the threats, assess and plan response to minimize probability and if possible, impact. If any metric results trigger the risk event, the contingency should be to determine the root cause, and where appropriate, documented in the Project Status Report (weekly and/or monthly).

The Enter Project Acronym Project Team shall analyze and determine root causes for metrics with results beyond limits or those with results trending in one direction. The Enter Project Acronym Project Team shall prepare a Corrective Action Plan to address root causes and report that plan to the Project Sponsor and the FX EPMO and during the Project Status Meeting. Any identified corrective actions will be logged in the Action Item Log and tracked to completion.

The Enter Project Acronym Project Manager shall complete a PCR for Corrective Actions affecting project scope, budget, or schedule.



## SECTION 8 CHANGE MANAGEMENT PLAN

The Enter Project Acronym Project Team and key stakeholders established the scope, schedule, and cost baseline during the Planning Phase of the Enter Project Acronym Project. When the Enter Project Acronym Project Manager determines the project has exceeded acceptable ranges of variance for scope, schedule, or cost, the project manager shall communicate the need for change to appropriate project key stakeholders and initiate the PCR Process.

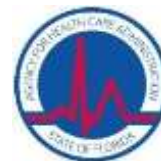
### 8.1 ROLES AND RESPONSIBILITIES

ROLE	RESPONSIBILITIES
Enter Project Acronym Project Manager	<ul style="list-style-type: none"><li>Log the Project Change Request (PCR) with assistance from the Enter Project Acronym Project Team</li><li>Assess the impact to project with the Enter Project Acronym Project Team</li><li>Update the scope, schedule and/or budget baseline after approval of the PCR</li></ul>
Enter Project Acronym Project Team	<ul style="list-style-type: none"><li>Identify potential change</li><li>Assist the Enter Project Acronym Project Manager in logging the PCR</li><li>Support impact analysis</li></ul>
Enter Project Acronym Project Change Control Board (CCB) comprised of <ul style="list-style-type: none"><li>&lt;Enter Project Acronym Project Sponsor</li><li>Enter Project Acronym Project Manager</li><li>Enter Project Acronym Project Liaison (AHCA)</li><li>FX EPMO Lead or designee</li><li>Contract Managers (state and vendor)</li><li>Client Executive or Account Manager</li><li>Other key stakeholders&gt;</li></ul>	<ul style="list-style-type: none"><li>Review PCR</li><li>Evaluate the impact of change</li><li>Approve or deny the PCR, or request additional information</li></ul>
<Add other roles as appropriate>	<ul style="list-style-type: none"><li>&lt;Add responsibilities as appropriate&gt;</li></ul>

**Exhibit 8-1: Change Request Control Board Participants**

### 8.2 CHANGE CONTROL PROCESS

The Enter Project Acronym Project Manager shall follow the change management requirements in the FX Project Management Standards and FX Governance Plan as applicable. A PCR is used to communicate a need for change. The PCR form is available on the Change Log of the FX Projects Repository.



## SECTION 9 RISK MANAGEMENT PLAN

This section describes the approach Enter Project Acronym Project Team shall use to identify, analyze, and manage risks. Risk Management will be an on-going process throughout the project life cycle.

### 9.1 ROLES AND RESPONSIBILITIES

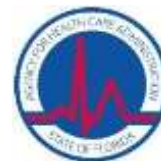
The roles and responsibilities relating to Risk Management are listed in the **Exhibit 9-1: Risk Management Roles and Responsibilities** below.

ROLE	RESPONSIBILITIES
Risk Originator (anyone)	<ul style="list-style-type: none"><li>Bring risk to the attention of the Project Manager &lt;or Risk Manager, if applicable&gt;</li></ul>
Enter Project Acronym Project Manager <If project large enough for Risk Manager, that role may replace PM>	<ul style="list-style-type: none"><li>Identify project risk</li><li>Work with Risk Originator to clearly log the risk</li><li>Monitor the risk and risk response</li><li>Confirm all project risks are reviewed at least monthly (confirm risk reviews are documented in the <i>Status</i> field)</li><li>Collaborate with the FX EPMO CRAIDL Coordinator on integrated risk management</li><li>Close risk when it's determined the risk can be closed</li></ul>
Enter Project Acronym Project Team, including Project Sponsor	<ul style="list-style-type: none"><li>Contribute to risk analysis</li><li>Confirm risk response plans</li><li>Monitor risks</li><li>Confirm a risk can be closed</li></ul>
Risk Owner (Identified by FX Project Risk Team)	<ul style="list-style-type: none"><li>Formulate and execute risk response plan(s) for assigned risk(s)</li><li>Apprise the Enter Project Acronym Project Manager &lt;or Risk Manager&gt; of the effectiveness of the risk response plan</li></ul>
FX EPMO CRAIDL Coordinator	<ul style="list-style-type: none"><li>Monitor entire Risk Log for quality of risk statements and response</li><li>Monitor entire Risk Log to confirm open risks are reviewed at least monthly</li><li>Advise Enter Project Acronym Project Manager &lt;or Risk Manager&gt; when updates need to be made to project-level risks</li><li>Address duplicate project risks</li><li>Coordinate integrated risk management</li><li>Report on project risks with risk exposures 15+ and/or risks affecting other projects</li></ul>
<Add additional roles as applicable>	<ul style="list-style-type: none"><li>&lt;Add responsibilities as applicable&gt;</li></ul>

**Exhibit 9-1: Risk Management Roles and Responsibilities**

### 9.2 RISK MANAGEMENT PROCESS

The Risk Management Process employed by the Enter Project Acronym Project Team involves identifying and categorizing project risks (Identify), validating and logging the risk (Validate/Log), assessing and prioritizing the risks so they are manageable (Analyze), developing a response strategy and assigning responsibility (Plan), monitoring open risks on a regular basis (Monitor/Track), and, communicating the risks and strategies on an ongoing basis



throughout the life of the project (Communicate). Risk management processes address individual project risks (those under the control or influence of the project team, such as quality of deliverables, cost, schedule, or technical risks) as well as overall risks (those outside the control of the project team such as governmental legislation or force majeure).

### 9.3 IDENTIFY RISKS

The Enter Project Acronym Project Team used the approved Project Charter, WBS, Risk Breakdown Structure guide, lessons learned from other projects, and discovery activities to identify and evaluate potential events that could positively or negatively impact the project; develop response plans; and manage accordingly.

### 9.4 PERFORM RISK ASSESSMENT

The Enter Project Acronym Project Team shall facilitate risk assessments with the intent of developing a risk response plan for risk with exposure scores of 15+. The Enter Project Acronym Project Team shall evaluate the risk's probability of occurring and the impact the risk would have, as well as what the triggering point could be.

#### 9.4.1 EVALUATING PROBABILITY OF OCCURRENCE

The Enter Project Acronym Project Team shall use the **Exhibit 9-2: Probability of Occurrence** matrix below to complete the *Probability* field of the risk form.

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

**Exhibit 9-2: Probability of Occurrence**

The Enter Project Acronym Project Team shall consider whether the associated triggering event is imminent (less than approximately eight weeks) when evaluating probability of the risk to be triggered.

#### 9.4.2 ASSESSING RISK IMPACT

The Enter Project Acronym Project teams shall use the **Exhibit 9-3: Impact on Project** matrix below to assess the impact to cost, schedule, scope, and quality of a potential risk event:



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 signification change in scope	Impact to quality is very likely	5

**Exhibit 9-3: Impact on Project**

The impact of a risk related to multiple factors will likely be the average of all relevant factors.

### 9.4.3 CALCULATING THE RISK EXPOSURE SCORE

The final step in the qualitative risk analysis process is to update the Risk Form with the probability and impact values captured in the previous two steps. Computation of the risk exposure value is automatic within the Risk Log based upon the *Probability* and *Impact* values entered. The formula used for the calculation is as follows:

$$\text{Risk Exposure Score} = \text{Impact value} \times \text{Probability value}$$

Risks with risk score values (15 or greater) are considered having high exposure.

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

**Exhibit 9-4: Calculated Risk Exposure**

## 9.5 PLAN RISK RESPONSES

The Enter Project Acronym Project Team shall prioritize any risk identified as *very likely* (5) or with *high impact* (5) with imminent timelines. The <Project Manager, Risk Manager, or Risk Owner> will then develop strategies to address the project risks. The Enter Project Acronym Project Team shall determine the required activities and resources to address the risks.

The Enter Project Acronym Project Manager shall assess responses for impact to schedule, resources, and scope. The risk response may require project documents (e.g., PMP, project schedule) be updated. If there is impact to schedule, scope, or cost, the Enter Project Acronym Project Manager shall assess the need for a project change request.



## 9.6 MONITORING AND CONTROLLING RISK

The Enter Project Acronym Project Team shall continually perform risk identification, risk response planning, and risk monitoring through the life of the project. The Enter Project Acronym Project Team will also track and report on risks identified as high probability/high impact or with imminent trigger dates (less than eight (8) weeks out).

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## SECTION 10 ACTION ITEM MANAGEMENT PLAN

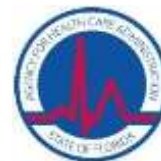
Action items are defined as independent tasks, which require follow up, and are not in the project schedule. Action items will be captured in the Action Item Log, located on the FX Projects Repository, when coordination with or impact to another project team is required. *<Administrative action items, which may come from team meetings (e.g., call a team member, send file to a team member), do not have to be logged.>*

Once the action item has been logged, the Enter Project Acronym Project Manager shall validate the action item, assign an owner, and confirm reasonable expected resolution due date.

The Enter Project Acronym Project Manager shall follow up on action items at a minimum during Weekly Status Meetings. The Enter Project Acronym Project Manager shall employ any other techniques necessary for reaching resolution.

Once the action item has been completed, the Named Owner or Project Manager shall update the resolution and update the status to closed.

Corrective Actions will also be logged in the Action Item Log and marked as Corrective Actions. The Agency's Enter Project Acronym Project Liaison, the FX EPMO, or the Enter Project Acronym Project Manager shall log Corrective Actions depending on the source of the corrective action (i.e., the Agency may record a Corrective Action to remediate an IV&V finding). The FX EPMO Quality Coordinator will monitor the progress of Corrective Actions until they are closed.



## SECTION 11 ISSUE MANAGEMENT PLAN

An issue is a problem affecting the project's scope, schedule, cost, and/or quality. Issues often spawn from risks. Sometimes issues are unanticipated. An issue needs to be addressed and resolved as soon as possible to avoid negative project impacts.

ROLE	RESPONSIBILITY
Issue Originator	<ul style="list-style-type: none"><li>Identify an Issue requiring resolution and notify the Enter Project Acronym Project Manager</li></ul>
Enter Project Acronym Project Manager	<ul style="list-style-type: none"><li>Log identified issues on the FX Projects Repository Issue Log</li><li>Facilitate the identification of issues and action items to resolve the issue</li><li>Perform analysis on issues and impact to the scope, schedule, and budget</li><li>Identify and assign an Issue Owner for each issue</li><li>Confirm identified issues are analyzed and issue resolution plans are approved and implemented as required</li><li>Review issues with the project team at the status meetings</li><li>Report open issues on status reports</li><li>Escalate to Project Sponsor and FX Governance as needed to facilitate timely resolution</li><li>Ensure issues are linked to appropriate risks in the Risk Log where appropriate</li><li>Assist the Issue Owner with issue resolution and closure</li></ul>
Issue Owner	<ul style="list-style-type: none"><li>Collaborate with the Enter Project Acronym Project Manager regarding the status of the issue or action item until it is closed</li><li>Participate in discussions with the Issue Originator to fully understand the issue</li><li>Research and draft the resolution</li><li>Attend status meetings to discuss/report on an issue</li><li>Drive the issue to resolution and closure</li></ul>
Project Team	<ul style="list-style-type: none"><li>Identify and report project issues to the Project Manager</li><li>Assist the Project Manager and Issue Owner in the resolution of issues</li></ul>
<Add other roles as appropriate>	<ul style="list-style-type: none"><li>&lt;Add responsibilities as appropriate&gt;</li></ul>

### Exhibit 11-1: Issue Management Roles and Responsibilities

#### 11.1 IDENTIFY ISSUES

An issue may be identified in any number of ways. The Enter Project Acronym Project Team will look for any of the following reasons to log an issue:

- A trigger has been activated for a currently identified risk
- A problem is negatively impacting the project for which there is no apparent answer
- An inability of two project entities or functional groups to come to an agreement on an item or process





- An action item with a late due date, which if not completed, will negatively impact the project
- The need for information external to the project inhibits or stops the development of the project objectives, deliverables, and/or solution until resolved

## **11.2 LOGGING ISSUES**

The Issue Originator shall work with the Enter Project Acronym Project Manager to enter the pertinent information about the issue into the Issue Tracking Log found on the FX Projects Repository.

## **11.3 RESOLVING ISSUES**

Enter Project Acronym Project Team, including the Project Sponsor. If unable to resolve the issue in a timely manner the Enter Project Acronym Project Manager shall notify the FX EPMO and begin following the escalation process identified in the Project Governance section of this document and FX Governance Plan, as appropriate.

Once the issue is documented and assigned, the Issue Owner shall analyze the issue and develop a plan for resolution describing the activities that need to be completed to close the issue.

## **11.4 MONITORING AND CONTROLLING ISSUES**

Issues shall be tracked in the FX Projects Repository and updated during the Enter Project Acronym Project Status Meeting. Open issues are provided as input to the Monthly Status Reporting process detailed in the Communications Management Plan section of this document.



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## SECTION 12      **DECISION MANAGEMENT PLAN**

The Enter Project Acronym Project Team shall use the Decision Log on the FX Projects Repository to record both decisions that have been made and decisions that are needed.

The Enter Project Acronym Project Manager shall capture the decision made or question posed and coordinate the resolution of the decision. The Enter Project Acronym Project Manager is responsible for documenting the resolution and closing the decision. If decision-making is not timely, the Enter Project Acronym Project Manager shall escalate according to the Project Governance section of this document and FX Governance Plan, as appropriate.

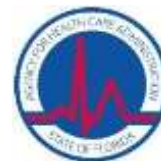


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## SECTION 13 LESSONS LEARNED MANAGEMENT PLAN

The Enter Project Acronym Project Team shall document any lessons learned throughout the life of the project. The Enter Project Acronym Project Manager, at a minimum, shall solicit lessons learned from the team and document using the Lessons Learned Log available on the FX Projects Repository at the end of each significant Phase Gate. Lessons learned will be recorded using a *start, stop, continue* orientation.

Key lessons learned during the Enter Project Acronym Project will be included in the Project Close Out Report completed during the Project Close Out Phase.



## SECTION 14 COMMUNICATIONS MANAGEMENT PLAN

### 14.1 OVERVIEW

The Communications Management Plan documents the formal communication process developed for the Enter Project Acronym Project. This Communications Management Plan defines:

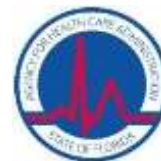
- What needs to be communicated
- Who is responsible for communicating with what audience
- When the communication needs to take place
- How information will be communicated

### 14.2 ROLES AND RESPONSIBILITIES

The following roles will participate in the execution of the Communications Management Plan.

ROLE	RESPONSIBILITIES
Enter Project Acronym Project Manager (or designee)	<ul style="list-style-type: none"><li>▪ Responsible for coordinating the creation, review, approval and distribution of general project-related communications</li><li>▪ Develop and communicate key messages for the project or communication collateral</li><li>▪ Inform the project team of key messages</li><li>▪ Assist team with general communications where appropriate</li><li>▪ Work with project team to ensure the identification, validation, and addressing of issues in their general communications</li><li>▪ Coordinate updates and maintenance of the Stakeholder Matrix and Meeting Log</li><li>▪ Coordinate with the FX OCM Services Team on integrated communications</li></ul>
Enter Project Acronym Project Sponsor	<ul style="list-style-type: none"><li>▪ If an issue or communication exceeds the scope of the project and involves security or topics considered newsworthy to the public, the Project Sponsor is responsible for escalating and coordinating with the Agency's public relations staff</li><li>▪ Assist in the development and preparation of key messages for the Enter Project Acronym Project</li><li>▪ Deliver certain messages to the team and other stakeholders (including Executive Agency Leadership/Groups) to show executive sponsorship for plans and messages</li></ul>
<Add roles as appropriate>	<ul style="list-style-type: none"><li>▪ &lt;Add responsibilities as appropriate&gt;</li></ul>

**Exhibit 14-1: Communications Plan Roles and Responsibilities**



## 14.3 COMMUNICATION METHODS

METHOD	FREQUENCY	OWNER
Enter Project Acronym Team Status Meetings	▪ <Identify frequency: weekly or biweekly>	▪ Enter Project Acronym Project Manager
<If not covered during team Status Meetings> Enter Project Acronym Issue and Risk Management Meeting	▪ <Identify frequency>	▪ Enter Project Acronym Project Manager
Project status update to Governance	▪ Upon invitation	▪ Enter Project Acronym Project Sponsor supported by the Enter Project Acronym Project Manager
Program-level Schedule Review Meeting	▪ Weekly	▪ FX EPMO Schedule Manager
Program-level Resource Coordination Meeting	▪ Weekly	▪ FX EPMO Lead (or designee)
Integrated Risk and Issue Management Meeting	▪ Monthly	▪ FX EPMO CRAIDL Coordinator
<Identify other meetings, e.g., Organizational Change Management (OCM) Meetings, Release Management Meetings>	▪ <Identify frequency>	▪ <Identify resource>
<Identify other communications, e.g., routine email distributions, sponsor meetings, etc.>	▪ <Identify frequency>	▪ <Identify resource>

**Exhibit 14-2: Communication Methods Table**

All meetings with the Agency and/or project integration meetings shall be recorded in the Meeting Log on the FX Projects Repository.

## 14.4 PROJECT REPORTING

REPORT	DESCRIPTION	FREQUENCY
Enter Project Acronym Weekly Status Report (WSR)	This is the regularly produced detail Project Status Report delivered	Weekly
Enter Project Acronym Monthly Status Report (MSR) to AST	This report is a summary of the month's project activities and progress	Monthly Refer to the FX Project Management Standards and the <i>Process Definition for Monthly Status Reporting</i> for details
<Identify other project reporting>	<Identify description>	<Identify frequency>

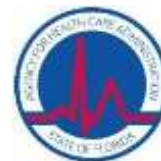


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### Exhibit 14-3: Project Reporting Requirements and Frequency

Agenda and summaries for all meetings will be stored according to document management processes in the Enter Project Acronym Project Artifact Directory on the FX Projects Repository.

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## SECTION 15 PROJECT STAKEHOLDER MANAGEMENT

### 15.1 OVERVIEW

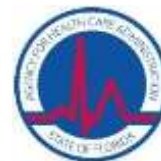
The intent of project stakeholder management is to identify individuals or groups the project will impact and develop appropriate strategies for effectively interacting with them. Stakeholder management focuses on communication with stakeholders to understand their communication needs and expectations, addressing issues as they occur, and fostering appropriate stakeholder awareness of project decisions and activities.

Update of the stakeholder management activities outlined in this section will occur as-needed and in accordance with the Task Order and/or DED procedures.

#### 15.1.1 ROLES AND RESPONSIBILITIES

**Exhibit 15-1: Stakeholder Management Roles and Responsibilities** below describes the Stakeholder Management Roles and Responsibilities.

ROLE	RESPONSIBILITIES
Enter Project Acronym Project Sponsor	<ul style="list-style-type: none"><li>Identify project stakeholders</li><li>Identify project resources to assist with producing other-than-routine communication collateral</li><li>Deliver communications as needed</li><li>Act as a champion for non-routine communications</li><li>Approve communication content and distribution</li><li>Facilitate access to stakeholder groups as needed</li><li>Consult and advise with the Enter Project Acronym Project OCM Liaison on stakeholder management strategies</li></ul>
Enter Project Acronym Project Manager	<ul style="list-style-type: none"><li>Identify project stakeholders</li><li>Bring stakeholder communication needs to the Enter Project Acronym Project Team for consideration</li><li>Participate in production, review, and approval of communication collateral at the request of the Enter Project Acronym Project Sponsor</li><li>Engage stakeholders as requested by the Enter Project Acronym Project Sponsor</li></ul>
Enter Project Acronym Project OCM Liaison	<ul style="list-style-type: none"><li>Stakeholder Management process owner</li><li>Collaborate with the FX OCM Services Team</li><li>Conduct baseline stakeholder analysis for the Enter Project Acronym Project</li><li>Facilitate periodic updates to the Stakeholder Management Plan, Communications Plan, and Stakeholder Analysis</li><li>Facilitate the development, approval and distribution of communications collateral to assure appropriate and effective stakeholder communication</li><li>Make recommendations to the Project Sponsor and project team on strategies to engage stakeholders, and manage stakeholder concerns</li><li>Identify risks associated with project stakeholder management and participate in the development of response plans</li></ul>



ROLE	RESPONSIBILITIES
<Add other roles as appropriate>	▪ <Add responsibilities as appropriate>

### Exhibit 15-1: Stakeholder Management Roles and Responsibilities

#### 15.1.2 STAKEHOLDER MANAGEMENT APPROACH

The Project's Stakeholder Management approach consists of the following components:



### Exhibit 15-2: Stakeholder Management Approach

The Project Stakeholder Management Plan for managing key stakeholders during the phases of the project relies upon the integrated use and monitoring of several project deliverables and work products. The use of the Stakeholder Analysis maintained by the OCM Services Team, Communications Plan, and the accompanying Stakeholder Engagement Plan, Meeting Table, and Communications Matrix to manage all stakeholder communication and feedback.

<After assessing required stakeholder artifacts in the PPA, the Enter Project Acronym Project Manager (and OCM Lead) should review the OCM Plan Deliverable and detail here what activities the Enter Project Acronym Project Team shall perform.>





## SECTION 16 DOCUMENT MANAGEMENT PLAN

### 16.1 OVERVIEW

This section highlights how the Enter Project Acronym Project Team shall create and maintain documents and to post them to the FX Projects Repository (FXPR). It also identifies the processes required to store and control FX Project documentation ensuring accessibility to authorized project stakeholders and to provide required document retention and security.

### 16.2 DELIVERABLE DEVELOPMENT ROLES AND RESPONSIBILITIES

**Exhibit 16-1: Document Management Roles and Responsibilities** below describes the document management roles and associated responsibilities.

ROLE	RESPONSIBILITY
Enter Project Acronym Project Team Deliverable Developer	<ul style="list-style-type: none"><li>Create the Deliverable Expectations Document (DED)</li><li>Submit draft DED to the Enter Project Acronym Project Manager for submission to the Agency</li><li>Participate in the DED review (or Deliverable Expectations) meeting</li><li>Update the DED based on the discussions in the Deliverable Expectations meeting(s)</li><li>Submit plan for logical breakup of large deliverables in the DED (if needed)</li><li>Develop deliverable</li><li>Submit deliverable for review and acceptance</li><li>If the deliverable is large, submit deliverable sections for acceptance per the agreed upon plan</li><li>Facilitate walk-through to orient reviewers to the deliverable</li><li>Work with Work Package Leads to resolve issues</li><li>Incorporate review changes to the deliverable</li><li>Submit revised deliverable to the Enter Project Acronym Project Manager for acceptance</li></ul>
Enter Project Acronym Project Manager	<ul style="list-style-type: none"><li>Update the Deliverable Tracking Workbook on a continual basis to accurately track status of deliverables</li><li>Coordinate and/or perform preliminary review of deliverables to confirm they meet contract requirements and basic quality standards</li><li>Provide written deliverable comments from reviewers as received to the Enter Project Acronym Deliverable Developer</li><li>Store final deliverable and other related documentation in the Enter Project Acronym Project Artifact Directory on the FX Projects Repository</li><li>Review project delivery processes, artifacts, requirements, and reports for appropriateness and accuracy</li><li>Store review comments (if applicable) and other related documentation in the FX Projects Repository</li><li>Confirm comments are addressed prior to resubmission</li><li>Collaborate and communicate quality standards, measures, processes, and awareness across the Enter Project Acronym Project Team and stakeholders as appropriate</li><li>Submit DEDs and deliverables to the Agency</li></ul>



ROLE	RESPONSIBILITY
AHCA Project Liaison	<ul style="list-style-type: none"> <li>Select Deliverable Review Team with the Enter Project Acronym Project Sponsor</li> <li>Review Deliverable Review Team roles with team members</li> <li>Identify Deliverable Stakeholders</li> <li>Participate in Deliverable Expectations Meeting</li> <li>Review and approve the Deliverable Expectations Documents</li> <li>Advise on how Enter Project Acronym Project Team should break up large deliverables into manageable sections</li> <li>Distribute deliverable to Enter Project Acronym Deliverable Review Team</li> <li>Manage the Deliverable Review and Acceptance Process with the Enter Project Acronym Deliverable Review Team</li> <li>Synthesize deliverable review comments to ensure consistency, completeness, quality, and accuracy of comments</li> <li>Act as Point of Contact (POC) for the Enter Project Acronym Project Manager</li> <li>Facilitate communication among Deliverable Stakeholders</li> <li>Participate in comment resolution process</li> <li>Escalate irresolvable issues to the Project Sponsor</li> <li>Make a formal recommendation to the Project Sponsor on acceptance or rejection of the deliverable</li> </ul>
Enter Project Acronym Deliverable Review Team	<ul style="list-style-type: none"> <li>Participate in Deliverable Expectations Meeting(s)</li> <li>Participate in deliverable development as a source of information for the Enter Project Acronym Deliverable Developer (Deliverable Review Team members do not do any formal development.</li> <li>Review deliverable according to assigned role</li> <li>Identify and record revision comments in required format and within the established review period</li> <li>Participate in comment resolution</li> <li>Review updates after the Deliverable Developer has made changes to the draft deliverable confirming the final deliverable meets established expectations</li> </ul>
Enter Project Acronym Project Sponsor	<ul style="list-style-type: none"> <li>Review comments and recommendations for the deliverables from the FX Domain Lead</li> <li>Facilitate the Enter Project Acronym review process</li> <li>Coordinate with AHCA Project Liaison on formal acceptance of deliverable</li> <li>Use appropriate escalation processes as needed for deliverable content issues</li> <li>Final sign-off on all deliverables</li> <li>Accept or reject the deliverable and communicate the disposition to the Enter Project Acronym Project Manager, Agency and Vendor Contract Managers, and the FX EPMO</li> </ul>
FX AHCA Project Team Contract Manager	<ul style="list-style-type: none"> <li>Notify appropriate parties of acceptance/rejection of deliverable</li> <li>Submit status reports in accordance with FX Project Status and Schedule Management Processes</li> </ul>
<Add roles as appropriate>	<Add responsibilities as appropriate>

### Exhibit 16-1: Document Management Roles and Responsibilities

#### 16.2.1 DOCUMENT REVIEW AND APPROVAL PROCESS

Enter Project Acronym Project Team shall follow three major sub-processes that make up the Deliverable Review and Acceptance process:



1. The **Deliverable Expectations Process** defines the tasks, responsible actors, and outputs for establishing the contractual acceptance criteria, and format and content expectations for project deliverables.
2. The **Deliverable Review Process** defines the tasks, responsible actors, and outputs for the submission, receipt, review, and feedback of draft deliverables and the resolution of review feedback for acceptance of a final deliverable draft.
3. The **Deliverable Acceptance Process** defines the tasks, responsible actors, and outputs for the approval and invoice payment of a final deliverable.

### 16.2.2 DEFINING THE DELIVERABLE EXPECTATIONS AND ACCEPTANCE CRITERIA

The Enter Project Acronym Project Manager shall facilitate Deliverable Expectations Meeting(s) with key review stakeholders, prior to the start of the deliverable development. The intent of Deliverable Expectations Meeting(s) is to formally establish expectations for the development of the deliverable. Expectations should focus on identifying and agreeing upon the *who, what, why, when, and how* for the development of the deliverable and should include the acceptance criteria for the deliverable under development.

The Enter Project Acronym Project Manager shall facilitate the Deliverable Expectations Meeting(s) in a timely manner sufficient to define, draft, and approve the DED to achieve the scheduled deliverable milestones set in the project's planning stage.

The Enter Project Acronym Project Manager shall update the PMP Scope Management Acceptance Criteria section as needed.

### 16.2.3 THE DELIVERABLE EXPECTATIONS DOCUMENT

The Enter Project Acronym Project Manager shall use the Deliverable Expectations Document (DED) to establish and manage deliverable expectations (i.e., content, format, review team, review timeframe, acceptance criteria for each of the deliverable expectations, and approver(s)). Also recorded in the DED is the developer's approach to meeting the deliverable requirements.

If the approved DED changes project scope, schedule, or cost, the Project Manager shall initiate the Change Control Process.

### 16.2.4 DELIVERABLE DEVELOPMENT

During deliverable development, decisions made by the Enter Project Acronym Project Team (including Project Sponsor) may conflict with the approved DED. When this occurs, the Deliverable Developer updates the approved DED and submits the revised document to the Enter Project Acronym Project Manager for submission to the Project Sponsor. The Enter Project Acronym Project Manager is responsible for facilitating the review and approval process for the updated DED.



### 16.2.5 DELIVERABLE QUALITY CONTROL

<Using the Quality Control section of the FX Project Management Standards and the Quality Control Checklist as a guide, define the Enter Project Acronym Project Team's internal quality control process here.>

### 16.2.6 DELIVERABLE REVIEW

Deliverable Review process is initiated when the Enter Project Acronym Project Manager submits a deliverable for acceptance. The deliverable will be 100% complete and in final format prior to submission. In the case of a phased deliverable, each of the sections will be managed as an individual deliverable. Once the review of each of the sections is complete, a final review will be conducted over the deliverable to ensure there are no gaps between the sections.

The Enter Project Acronym Project Team shall notify the Project Sponsor that the deliverable is posted for review on the FX Projects Repository. The Enter Project Acronym Deliverable Review Team shall review the deliverable and provide feedback within the timeframe specified in the approved DED. The Enter Project Acronym Project Manager shall log an issue if notification of deliverable acceptance or rejection has not been provided to the Enter Project Acronym Project Team within that time, naming the Project Sponsor as the issue owner.

<Define the method that will be used for capturing Deliverable Review Team comments. The standard is inline comments.>

### 16.2.7 DELIVERABLE REVIEW PERIOD

The deliverable review period will be established in the respective DEDs. These timeframes will be reflected in the baselined schedule.

### 16.2.8 DELIVERABLE REVISION

<Define how the team will review and respond to review comments and update deliverable.>

### 16.2.9 DELIVERABLE SUBMISSIONS

The Enter Project Acronym Project Manager shall, according to contractual obligations, formally submit documents to the Agency by providing a link to the artifact requiring review in an email to the Deliverable Review Team identified in the approved DED.

Subsequent submissions for approval will include comments from previous submissions.

### 16.2.10 APPROVED DELIVERABLES

Upon deliverable approval, a final version will be stored with all comments, tracked changes, and notes removed, with correct naming convention applied as specified in the Deliverable Quality and Document Management Standards.



## **16.3 DOCUMENT MANAGEMENT**

### **16.3.1 PROJECT ARTIFACT DIRECTORY**

Enter Project Acronym work products and project artifacts will be stored in the Enter Project Acronym Project Artifact Folder [<insert link>](#) on the FX Projects Repository, except for the project schedule and status reports.

- The Project Schedule is stored in the Schedule folder [<insert link>](#).
- The Weekly and Monthly Status Reports are stored in the Reports Folder [<insert here>](#).

[<Define here with links to the project folder, a guide for what and where artifacts will be.>](#)

### **16.3.2 ROLES AND RESPONSIBILITIES**

The Enter Project Acronym Project Manager is responsible for managing and controlling the artifact directory in accordance with the FX Project Management Standards. All Enter Project Acronym Project Team members are responsible for ensuring the documents are stored in the directory in a timely manner.

### **16.3.3 DOCUMENT NAMING STANDARDS**

The Enter Project Acronym Project shall follow the naming conventions defined in the FX Project Management Standards.

### **16.3.4 DOCUMENT VERSION CONTROL**

The Enter Project Acronym Project shall follow the corresponding requirements in the FX Project Management Standards.



## **SECTION 17      RESOURCES MANAGEMENT PLAN**

### **17.1 OVERVIEW**

The Enter Project Acronym Project Resource Management Plan (RMP) describes how project resources will be planned for and managed.

### **17.2 PLAN RESOURCES**

While working through project initiation and planning activities, the Enter Project Acronym Project Manager determines the resource types, quantity of resources, and other parameters needed to properly resource activities in the Enter Project Acronym Project schedule.

### **17.3 HUMAN RESOURCE ACQUISITION**

The Enter Project Acronym Project Manager is responsible for working with project leadership (Project Sponsor, the vendor's project leadership, and the FX EPMO, if appropriate) to identify and acquire the appropriate staff to deliver the scope of the project. The Enter Project Acronym Project Manager shall work with the Project Sponsor to identify those resources from the Agency needed to fill identified roles and their level of effort will be captured in terms of Percent (%) Utilization.

Human Resource acquisition will continue throughout the project life cycle. The core project team having started during initiation, the Enter Project Acronym Project shall continue to onboard resources at various times prior to specific tasks beginning or as replacements to current resources. If there is a delay in acquiring a resource for scheduled work, the Project Sponsor will be made aware and an issue will be logged and escalated as needed.

### **17.4 MANAGE RESOURCE**

The Enter Project Acronym Project Manager shall work with the project team to minimize impact of non-working time. The project team shall notify the Project Manager as soon as a need for time off is identified and will record time off (of 1 day+) on the Team Member Out of Office Calendar on the FX Projects Repository. The Enter Project Acronym Project Manager shall update the project schedule accordingly. Transitioning of staff responsibilities will be the responsibility of the project team to minimize adverse impacts to project due dates and to smoothly transition knowledge and activities.

The Enter Project Acronym Project Manager shall work with the project team to minimize impact of non-working time. The project team shall notify the Project Manager as soon as a need for time off is identified and will record time off (of 1 day+) on the Team Member Out of Office Calendar on the FX Projects Repository. The Enter Project Acronym Project Manager shall update the project schedule accordingly. Transitioning of staff responsibilities shall be the responsibility of the project team to minimize adverse impacts to project due dates and to smoothly transition knowledge and activities.



## SECTION 18 OUTCOME AND BENEFITS MANAGEMENT PLAN

The Enter Project Acronym Strategic Governance authorized Project to achieve the following outcome(s) identified during the portfolio management process:

1. <List outcome(s) and associated benefits>

These outcomes and associated benefits (tangible and intangible) are tracked in the Benefits Realization Tracking Workbook. Attainment of outcomes is a criterion of project success and a consideration for whether a project continues. Thus, the Enter Project Acronym Project Manager and the Enter Project Acronym Project Sponsor and/or Steering Committee will consider the impact a variance or change has on achieving stated outcomes and benefits. If the Enter Project Acronym Project encounters a situation that impacts outcomes and/or benefits, the Project Manager shall notify the FX EPMO, which in turn, shall notify the FX Portfolio and FX Governance teams. The Enter Project Acronym Project Manager shall provide documentation and support upon request.

The Enter Project Acronym Project shall report progress toward outcome and benefits realization tracking on a quarterly basis as required by the FX Project Management Standards and upon request.



## SECTION 19 PROJECT GLOSSARY

For a definition of terms and acronyms used throughout this document, refer to the [Project Glossary](#) located on the FX Projects Repository.

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