



Veterans Affairs

Regional Data Processing

Project Management Plan



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Project Management Plan Authorization Memorandum

I have carefully assessed the Project Management Plan for the Regional Data Processing (RDP) initiative. This document has been completed in accordance with the requirements of the Department of Veteran Affairs Office of Information and Technology IT Project Management Handbook.

MANAGEMENT CERTIFICATION - Please check the appropriate statement.

_____ The document is accepted.

_____ The document is accepted pending the changes noted.

_____ The document is not accepted.

I fully accept the changes as needed improvements and authorize initiation of work to proceed.

Ray Sullivan
RDP Chief Operating Officer

DATE

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1 Executive Summary

Purpose

This document contains the Regional Data Processing (RDP) Project Management Office (PMO) role and strategy for supporting and executing the RDP initiative from a Project Management perspective.

The PMO works directly with RDP Leadership to apply proven methods, strategies, standards, and best practices for project management. Utilizing the various plans and strategies contained in this document will help ensure successful implementation of the RDP initiative.

Project Background

In recent years, Congress has increased pressure on the Veterans Administration (VA) to consolidate its data processing centers. This is driven by the need to increase the efficiency and effectiveness of the Agency's information technology (IT) infrastructure and improve the delivery of Veterans Health Administration (VHA) services. This push to consolidate data processing centers and improve overall investment efficiency is also driven by the tightening of the Agency's budget and an increased level of scrutiny from both VA and the Office of Management and Budget (OMB).

To address these challenges, VA is consolidating data processing centers across the enterprise via RDP.

Project Definition

RDP is the co-location or consolidation of 128 Veterans Integrated Services Network (VISN) data centers to four Regional Data Processing Centers or "RDPCs". The four RDPCs will be located in two Regions, one within each of the following cities:

- Region 1 (West)
 - Sacramento
 - Denver
- Region 4 (Northeast)
 - Philadelphia
 - Brooklyn

An Infrastructure Assessment of the remaining VISNs in Regions 2 and 3 (VISNs 6-12, 15-17, 23) will be conducted to determine their preparedness and necessary changes to achieve Minimum Level of Operations (MLO) at each of the locations.

This project will examine the results and impact of the RDPCs in Regions 1 and 4 to assess the feasibility and anticipated benefits of implementing an enterprise-wide Co-location Program across all VISNs – including developing the detailed implementation plans through FY 2007. It additionally launches a PMO responsible for coordinating and providing guidance for the implementation.

Strategic Alignment

RDP supports the following VA strategies:

- **One-VA Architecture policy, strategy, and guidance.** RDP is consolidating the current data processing center architecture – migrating from a distributed architecture at the medical center/facility level to a regionally distributed architecture. This migration will establish a modified infrastructure which supports the needs of current and future VHA healthcare systems (e.g., VistA Legacy and Health eVet-VistA) and other elements aligned with VA and VHA strategies and program goals.
- **Priority 5 of the Undersecretary of Health’s 12 Priorities for 12 Months: Improving Information and Care Coordination.** RDP will improve the current data processing architecture and establish an infrastructure to more efficiently implement next generation health services delivery programs.
- **Federated IT System (IT Reorganization).** RDP provides many benefits that align with the Federated IT System, as listed in Table 1.

Federated IT System Goals	RDP
Enhance operational effectiveness, provide standardization, eliminate duplication	<ul style="list-style-type: none"> ✓ Improves efficiency, standardization, operational performance, and reliability <ul style="list-style-type: none"> - Unifies management structure and realize efficiencies via reduced data centers - Provides robust, reliable, and flexible infrastructure via unification and standardization - Provides higher levels of redundancy - Improves continuity of operations (COOP) ✓ Enables next generation healthcare delivery
Improve the VA’s ability to provide the full range of benefits and programs to the nation’s veterans.	<ul style="list-style-type: none"> ✓ Enables VA to implement the best Health Data Repository (HDR) in the world. ✓ Positions VA to respond better and faster because we will be more centralized <ul style="list-style-type: none"> - Positions VHA to efficiently and rapidly integrate new technologies ✓ Gives local levels better span of control ✓ Enables VA to deliver a scalable, world-class data center <ul style="list-style-type: none"> - Delivers world-class

	healthcare infrastructure - Enables next generation healthcare delivery
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Table 1: Alignment with Federated IT System

Approach

The functional approach selected for the RDP Project involves the implementation of two regional demonstrations that will serve to consolidate VISNs in Region 1 (West) and Region 4 (Northeast). These demonstrations include the consolidation of regional data centers and the optimization of resources to function efficiently. After these demonstration projects have been completed, their “lessons learned” will be analyzed and applied to the MLO implementation.

Implementing the RDP Project involves three primary elements: a deliverables-based management methodology, a team of highly skilled experts with a solid understanding of the elements needed to transform VHA’s data processing center environment, and an overall focus on managing the organizational transformation that must occur to accomplish the technology, governance, and geographic changes inherent in this project. Figure 1 illustrates these three underlying elements of the approach and how these elements support the RDP Project.

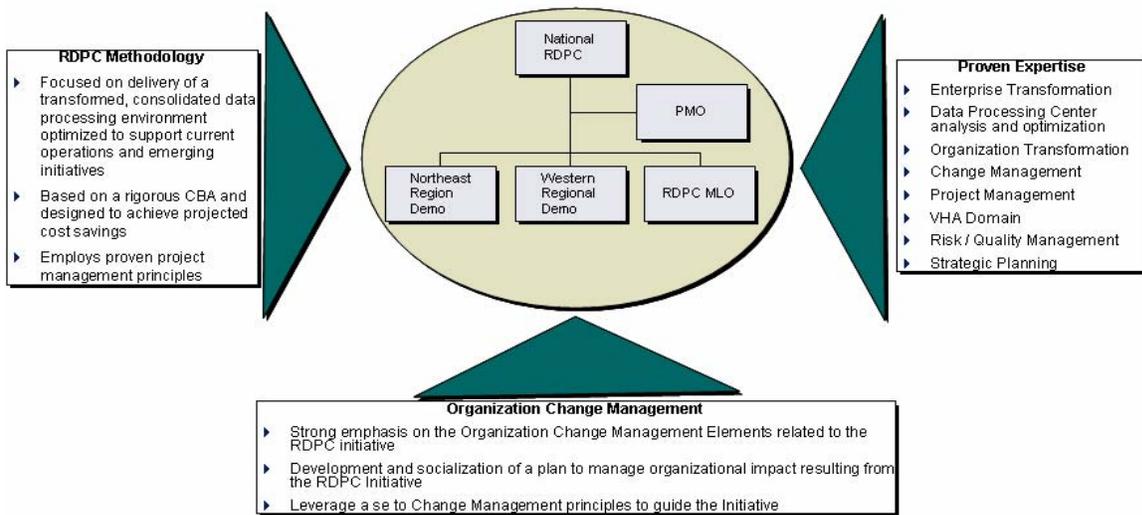


Figure 1: RDP Consolidation Approach

Through the use of a One-VA methodology there is the assurance of a measurable progress in completing the project. Previously agreed-upon deliverables help insure that all project aspects are addressed and completed in the proper sequence and phase. In addition, using this methodology results in the employment of tested and proven project management processes utilized by the Project Management Institute (PMI) in their Project Management Body of Knowledge (PMBOK). Throughout the project’s lifecycle, utilization of the PMBOK processes

follows VA-established project management guidelines and helps reduce project risk by applying proven methods. Further, deliverable due dates provide a method to monitor specific progress and/or milestones to measure on-going performance.

Through the use of a team of highly skilled experts with a solid understanding of the elements needed to transform VHA's data processing center environment, the specialized aspects of the project are expertly managed. Within the Project Management Office are experienced Subject Matter Experts who specifically address such issues as risk management, communications, quality control, configuration management, security, and project scheduling. Technical Subject Matter Experts will assist with network modifications, build-outs, hardware installations, etc. All of these resources will be shared within each VHA region as needed – thus ensuring efficient, specialized resource allocation.

Providing an overall focus on managing the organizational transformation, which must occur to accomplish the technology, governance, and geographic changes inherent in this project, is critical. The initial RDP initiative recognizes the necessity for organizational change management to insure a successful project completion. Through the development of a formal Organization Change plan, all affected areas have the opportunity to view and understand any organizational impact that will result, and manage those changes.

2 RDP Project Scope

Scope Planning & Definition

Scope planning and scope definition are both linear processes that result in specific outputs. Once scope planning has been completed a scope statement is generated and then utilized as an input for the scope definition process. In turn, the WBS is the output generated from completing the scope definition process. Both of these process flows are illustrated in the following figures:

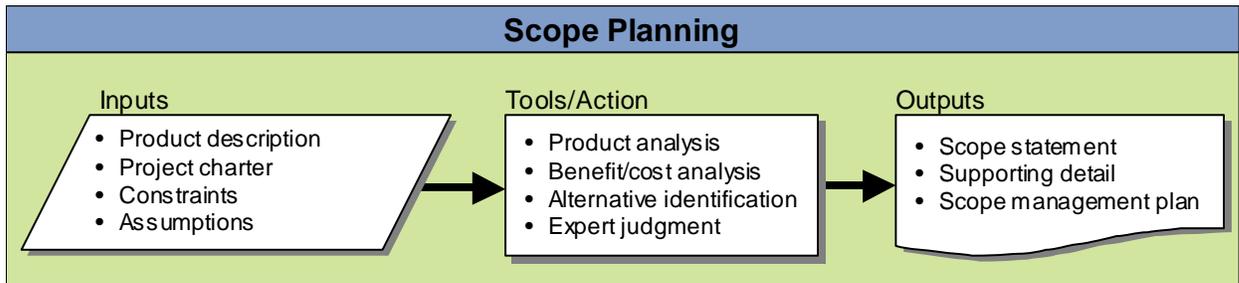


Figure 2: Scope Planning Process Flow

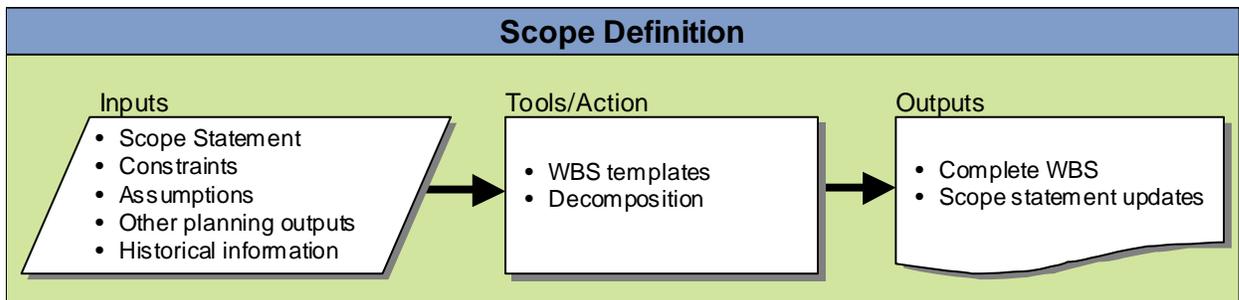


Figure 3: Scope Definition Process Flow

Scope Statement

To better align with the next generation healthcare delivery processes being implemented within VHA, the current data processing infrastructure needs to be transformed. This transformation involves by replacing, reengineering and re-hosting existing applications to a modern computing architecture and infrastructure. A key element of this is the migration to a VISN-centric data processing infrastructure. This transformation will be accomplished using a phased approach, with specific new applications and services coming “on-line” as their legacy counterparts are retired.

This scope involves:

1. Development of a detailed economic and feasibility analysis to support the selection of a national level architecture to execute the RDP Initiative.
2. Establish a Project Management Office to coordinate the communication and execution among VISNs, regions, external offices, and stakeholders involved in and affected by the RDP Initiative.
3. Develop an approach to “stand-up” the RDP environment, including supporting processes and required enabling network and technical infrastructure.
4. Guide the implementation and rollout of the RDP environment as defined through FY 2007 – including execution of processes defined for the RDP PMO.

Project Business Need

RDP will yield the following business benefits:

- Improve efficiency, operational performance, and reliability
- Enable a “next generation” of healthcare delivery
- Improve preparedness for adverse event scenarios
- Enable the VA to implement the best Health Data Repository (HDR) in the world
- Position the VA to respond better and faster through centralization

At the same time, there is a business need to demonstrate that RDP implementation will still enable VISN-level involvement and a continuation of world-class healthcare service. Centralization of facilities and resources does not diminish the capacity to influence future development of key information application systems.

The RDP Initiative will be deemed successful if the RDP model has demonstrated its effectiveness against an established set of critical success factors. These include customer satisfaction, cost efficiencies, and other measurable areas. Further, success will also be measured by the establishment of a governance structure that can support the RDP model – a model that serves as a “cookbook” for replication throughout the VA.

Project History

Currently, Data Processing across the VA is decentralized at the Medical Center Level. This decentralization leads to redundant capabilities and inefficiencies. The current model is not sustainable due to resource limitations.

As a result, the RDP Initiative is focused on increasing the efficiency of the VA IT Infrastructure by optimizing the data center environment. This project began in December, 2001. The project goal is to co-locate and/or integrate the various Data Centers at the VISN level. Migration from the local level is the first step, followed by VISN-level co-location in the second step. Finally, regional co-location will be the final goal.

A number of current and previous initiatives have analyzed RDPC co-location at the VISN and Regional levels. VISN 3 conducted an assessment study on co-location. VISN 20 performed a co-location analysis and pilot. VISN 2 completed a co-location analysis. VISN 15 was involved in a pilot study.

Project Objectives

Project Objectives consist of the business benefits that VHA expects to achieve as a result of spending time and exerting effort to complete this project. The following table lists specific objectives of the RDP Project and a brief description of the objective.

OBJECTIVE	DESCRIPTION
Establish the support infrastructure required to support the National RDP Initiative	Formation of the RDP PMO through resource staffing, direct involvement with the region Teams and region support.
Develop and assist in the execution of the high-level RDP Strategy	National & Regional Project Managers work alongside VHA and VISN decision makers in both an active and supportive role.
Monitor and report overall project progress	PMO serves as a project monitoring & tracking “clearinghouse” to coordinate and report on project status.
Establish the support infrastructure required to support the specific Regional Demonstrations	SME resources within the PMO serve to both support specific regions and coordinate activities across the regions.
Develop and assist in the execution of each Regional RDP Strategy	Via weekly meetings and other means, the PMO can provide expert recommendations in a timely manner and assist with strategy execution.
Provide Project Management support and expertise to the Regional COO	Through the National Project Manager, PMO resources serve in an experienced advisory role
Provide the analytical support and resource coordination required to support the establishment of the RDP PMO	PMO Project Manager and Team Leads coordinate the activities of team members while also assisting with issues facing the individual demonstration Regions.

OBJECTIVE	DESCRIPTION
Support the RDP Management in performing ad hoc analysis to support the planning and rollout	Both the National Project Manager and Western Region Project Manager participate in initial project planning stages. Additional SME support brought onboard as required.
Support the creation of key deliverables and reports to project stakeholders (e.g., IDMC Briefings, NLB Status Updates, VISN CIO Council Briefings, etc.)	Working in coordination with the demonstration Regions, the PMO produces required documentation deliverables; periodic reports; and required presentations to project stakeholders.
Development of an Organization Change Management Strategy as a key enabler to the RDP Project	PMO Organizational Change SME works with Project Managers and regional teams to create a change management methodology for approval and implementation.
Development of a Communications Strategy	PMO Communications Management SME works with Project Managers and regional teams to create a Communications Plan for approval and implementation.
The development of a standardization approach for rolling out the RDP changes	Change Management issues are identified and collected in the Change Management Plan to guide the project Team accordingly.
Incorporate critical Risk Management issues into the RDP planning, analysis, and rollout	Dedicated Risk Management SME works with PMO and region Teams to identify and capture potential risks in the Risk Management Plan.
Planning, tracking, and reporting of critical tasks and milestones associated with the RDP Initiative at the National Level	PMO Project Planner/Scheduler works with Project Managers to capture and track relevant tasks; and to report updated status on milestones and deliverable due dates.
Support the RDP planning and analysis activities	National and Regional Project Managers, with support from the PMO, function as “trusted advisors” to the Teams in determining and analyzing project activities.
Establish the support infrastructure require to support the MLO	Project Managers and the PMO team are in tune to the needs of the MLO after having supported both West and Northeast Demo.
Develop and assist in the execution of the MLO RDP Strategy	Utilization of prior “best practices” and processes during the project demonstrations are applied to the MLO RDP Strategy
Provide Project Management support and expertise to the MLO COO	PMO Project Managers will have recent expertise in supporting the Demonstration Team’s management.

OBJECTIVE	DESCRIPTION
Planning, tracking, and reporting of critical tasks and milestones associated with the RDP Initiative at the Regional Demonstration Level	The entire PMO team will perform these functions on a daily basis to track project progress and manage deliverables
Analysis of the impact of the RDP change on the support organization at the VISN and facilities level	Organizational Change planning, along with interaction with the Demonstration Teams to help identify issues and their resolution.
Support the assessment of the Organizational Change Management Issues across the entire RDP	Lessons learned from the project demonstrations are applied across the entire RDP regarding Organizational Change.

Table 2: Project Objectives

Project Assumptions and Constraints

The successful completion of any project is dependent upon the validity and accuracy of certain assumptions that are incorporated into project planning. Should any of these assumptions prove invalid, project success may be placed in jeopardy. Thus, it is important to identify those initial assumptions and their potential risk.

Constraints, on the other hand, identify “limits” or other restrictions under which the project must operate. Constraints are not always of a negative nature – some limitations can be beneficial to a project. What is important regarding constraints – that they are clearly identified prior to a project start. Identification of these constraints allows project planning to be adjusted accordingly.

In some cases, project assumptions that prove to be inaccurate can develop into new project constraints (most likely negative in nature). Identified assumptions and constraints for this project include:

- Organizational Change management is key to the success of this project:
 - Co-location and consolidation of resources to a regional model requires careful organizational change management to mitigate personnel relocation issues and ensure no adverse impact to the delivery of healthcare services.
 - The transformation from a medical center-centric model to one that is focused regionally will move data and equipment “away” from end users and may require the relocation of personnel to new facilities.
 - There is the potential for adverse impact to the existing culture related to the staff restructuring and realignment needed to implement data center consolidation.
 - Changing the management model at the data processing center level may surface resistance from managers reluctant to relinquish operational control, thus slowing the implementation progress.

- Management support must be provided to facilitate and support the key communication elements identified to manage the organizational change.
- There is a need for extensive communication (to insure delivery of accurate and timely information) – within component RDP subprojects, among the subprojects, and externally to support the organizational change management.
- Once developed, progress at each step of the Initiative will be assessed to validate assumptions in the baseline and determine the impact on the results of the CBA. Changes in these assumptions will require similar adjustments elsewhere.
- It is a critical assumption that Regional Demonstration objectives will be successfully achieved to provide support to elements of the MLO Implementation.
- There are critical areas of the project which will be intentionally under-supported due to the initial focus on creating the foundation for the Initiative. These areas include the following:
 - Limited project planning support for the Regional Demonstrations – while some support will be provided, the focus will be on the National Level, with additional support at the Regional Level added later.
 - Limited organizational change management support for the Regional Demonstration – initial change management emphasis will be on developing a national change management plan for the initiative – as the emphasis shifts to regional issues additional resources will be required.
 - Limited support for the MLO effort – the initial focus will be on the National Level and Regional Demonstrations, limited resources will be allocated to the MLO.
 - No dedicated support on security management – initially security elements will be managed by the PMO resources on a part time basis – later, a dedicated resource will be added to fully address security issues and develop the Security Management Plan
- The management approach must emphasize communications, timeliness, and continual process improvement.
- Any project assumptions that can later be replaced/updated by actual data may require adjustments in the project plan and associated project resources.

Project Deliverables

A project deliverable can be any measurable, tangible, verifiable item that must be produced to complete the project. These deliverables are subject to VHA approval. Once project deliverables are defined, it is important to provide the context in which they are relevant to the project. Further, their position in relation to the overall RDP Initiative. The following table lists specific project deliverables for the RDP Project.

PROJECT DELIVERABLE	DEFINITION	ROLE IN THE RDP INITIATIVE
Support the RDP Initiative	This is a daily task whereby the entire PMO staff provides expert assistance to each Region as needed.	PMO knowledge (and support) increases through Demonstrations to fully support MLO.
Perform Program Management & Supporting Activities	Project Management support for each region, coordinated through the PMO.	Organizes and coordinates overall program management from a central location (PMO).
Perform Contract Management/Develop Work Plan	Leverage SME capabilities to assist in project planning.	Assists the RDP in creation and management of overall project planning.
Perform Quality Assurance	Insures project alignment with quality standards in place.	QA function within the RDP and relevant to other VHA projects (i.e. HealtheVet).
Project Charter	Outlines the objectives, scope, stakeholders, and project structure.	Defines role of the PMO in support of Region Demos & MLO Implementation.
Cost Benefit Analysis	Development of a detailed, top-down analysis of the costs, benefits, and risks associated	Replaces assumptions with actual data and defines project financial performance metrics.
Project Plan	Monitor project schedule, track progress, provide progress reports, and track performance metrics.	Changes to a plan within one project (demo) could impact other projects.
Communications Management Plan	Documenting consistent communication through well-designed communications channels.	Outline the phasing of the Communications plan over the entire lifecycle of the project from inception through the transitional implementation phase to the future organization.
Risk Management Plan	Identification of potential project risks, with the risks being quantified and the risk impacts assessed.	Initial Risk Management Plan for the Demonstrations incorporate lessons learned into the MLO Risk Management Plan.

PROJECT DELIVERABLE	DEFINITION	ROLE IN THE RDP INITIATIVE
Organization Change Management Plan	Discussion of organizational roles and responsibilities of the various key stakeholders, regions, VISNs, local sites, and the shared supporting services.	Organizational Change Management Plan will be focused on the Demonstrations – with lessons learned incorporated into the MLO Organizational Plan.
Security Management Plan	Documents security concerns associated with collocating disparate hardware and concerns such as locks, fire protection, backup power, etc.	Ensure compliance with government security regulations and RDP security configuration requirements; identify and document the RDP C&A approach.
Configuration Management Plan	Process allowing project managers who are dependent on code, hardware, or interfaces being developed are informed of changes that may impact them.	Configuration Management Plan will be focused on the Demonstrations. Lessons learned will be incorporated into the MLO Configuration Management Plan.
Quality Management Plan	Plan focuses on ensuring the level of quality and completeness is adequate across the entire project; Identify and document applicable quality standards.	Coordinates alignment of project technology choices with critical related processes and systems which have a likelihood of impacting the RDP effort.
Earned Value Analysis	Measures project performance according to project cost and schedule; estimates cost to complete the project.	Provides senior RDP management capability to monitor and manage project costs.
Primavera (TeamPlay)	Enterprise-wide, government mandated project management software for tracking tasks, milestones, risk, etc.	Project managers and stakeholders updated on project status and inter-action with other RDP schedules.
PMO Standing Operating Procedure(s)	Operating procedures that may be internal to the PMO or external to a Region or RDP.	Provides a standard by which PMO functions consistently in all RDP practices.

Table 2: Project Deliverables

3 Work Breakdown Structure (WBS)

The Work Breakdown Structure (WBS) serves as a graphical representation of the different tasks that must be completed during the project. The Work Breakdown Structure facilitates the planning and control of cost, schedule and technical quality of the project outcome.

A Work Breakdown Structure is developed by identifying the project deliverable and then successively subdividing that deliverable into increasingly detailed and manageable subsidiary deliverables or components.

Breaking down each level of the work into more defined components, until the lowest, results in the works package level. Each component of the WBS has its own set of goals and project objectives which must be achieved in order for the overall project objectives to be met.

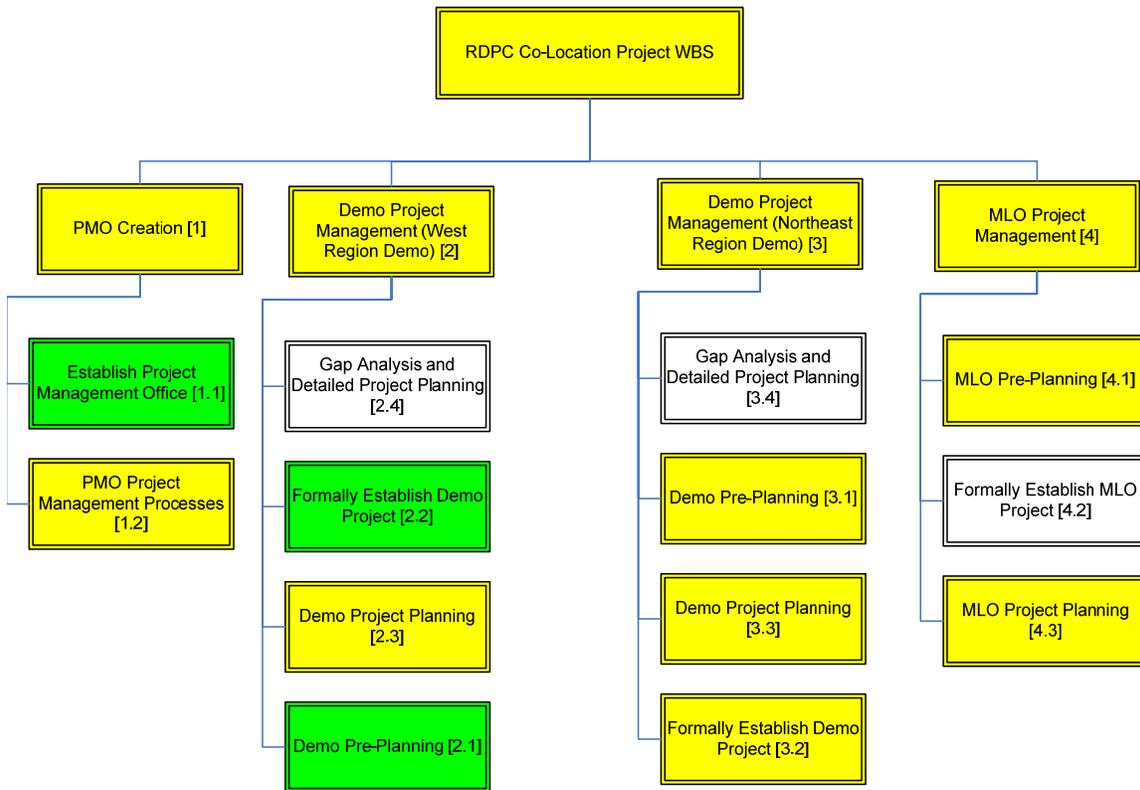
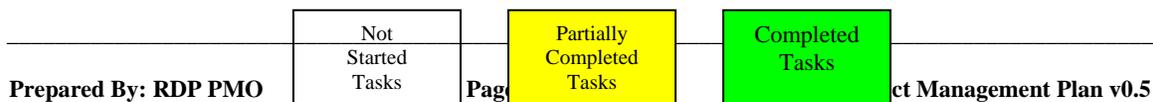


Figure 4: Top Level, WBS

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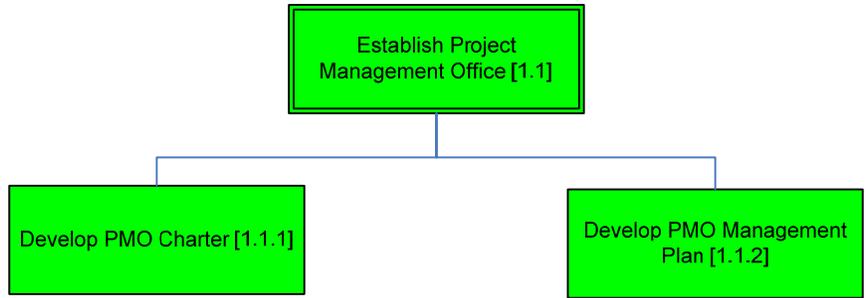


Figure 5: WBS Level 1.1

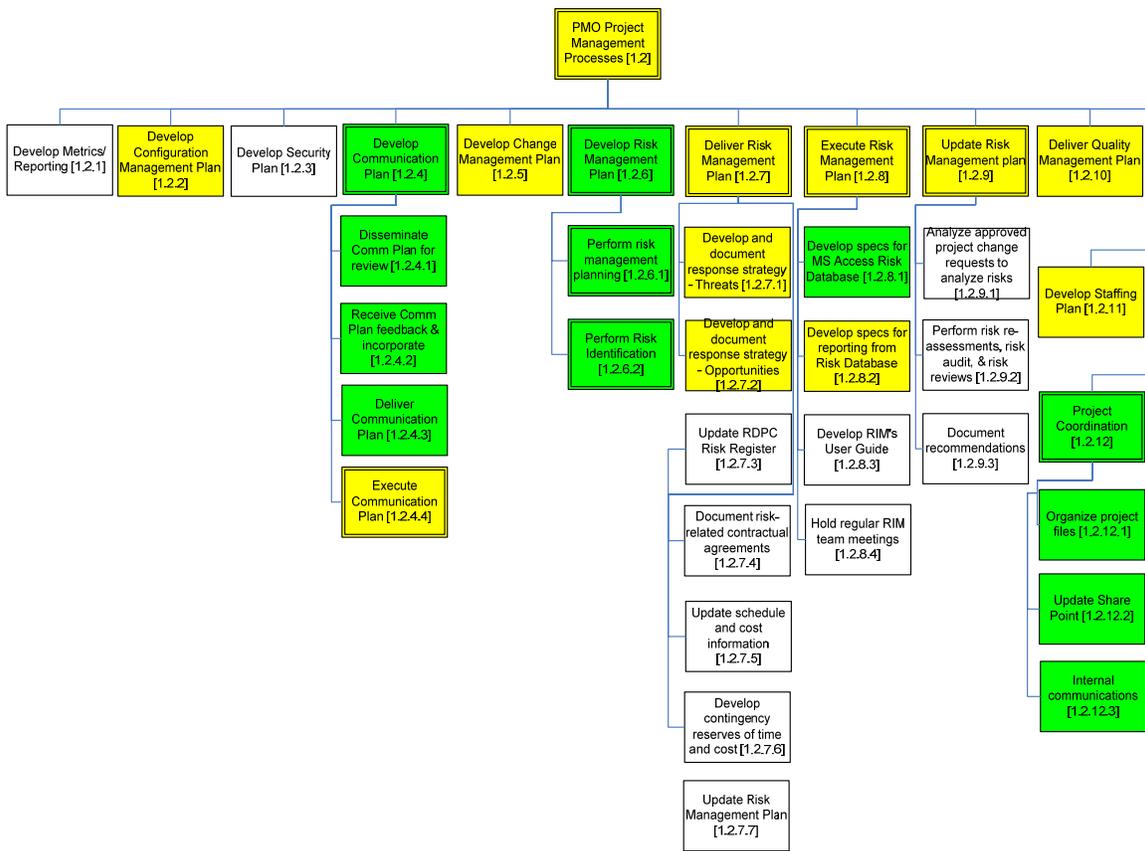
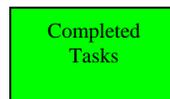
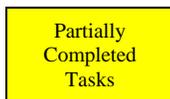
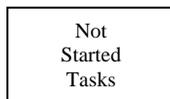


Figure 6: WBS Level 1.2

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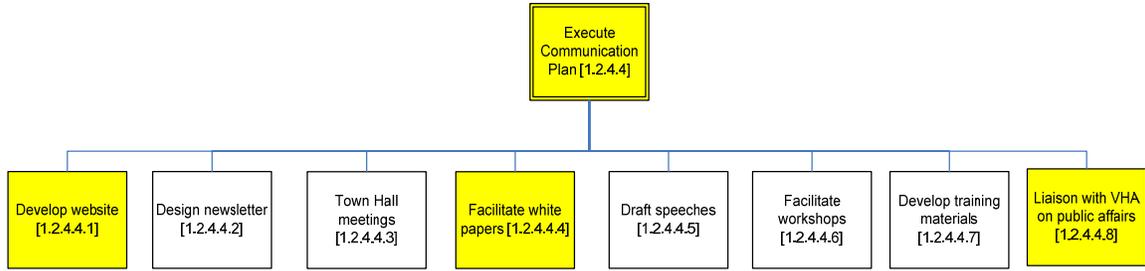


Figure 7: WBS Level 1.2.4.4

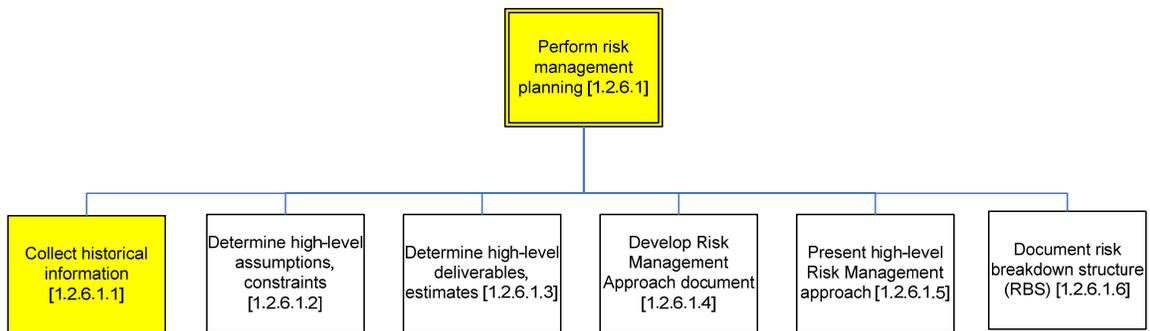


Figure 8: WBS Level 1.2.6.1

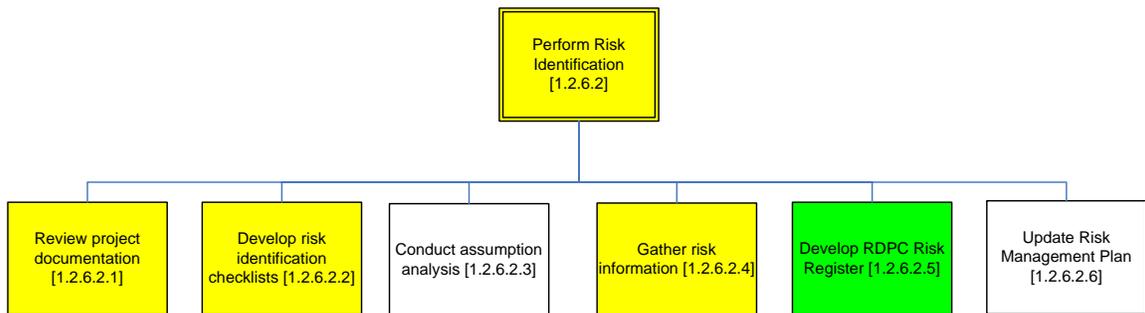
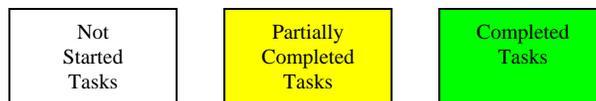


Figure 9: WBS Level 1.2.6.2

LEGEND



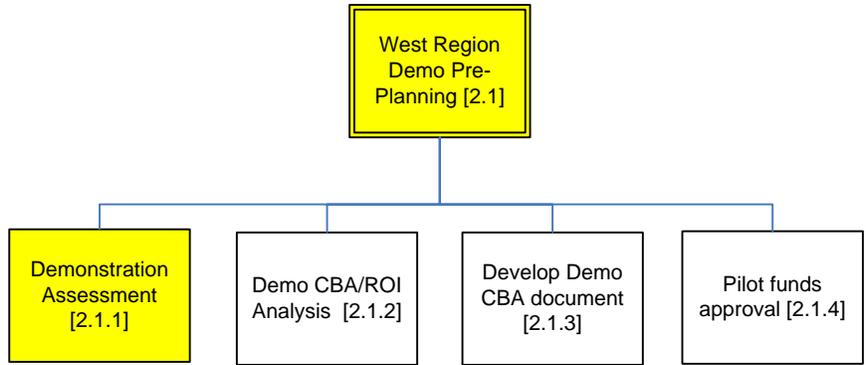


Figure 10: WBS Level 2.1

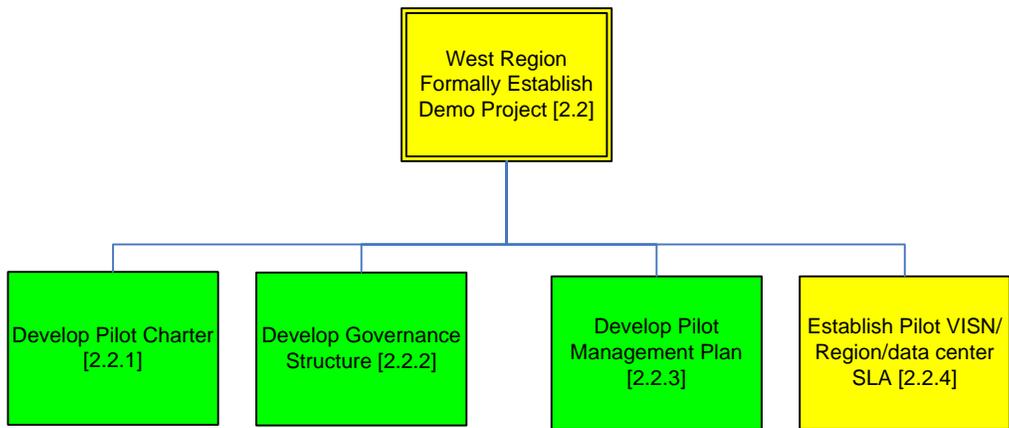


Figure 11: WBS Level 2.2

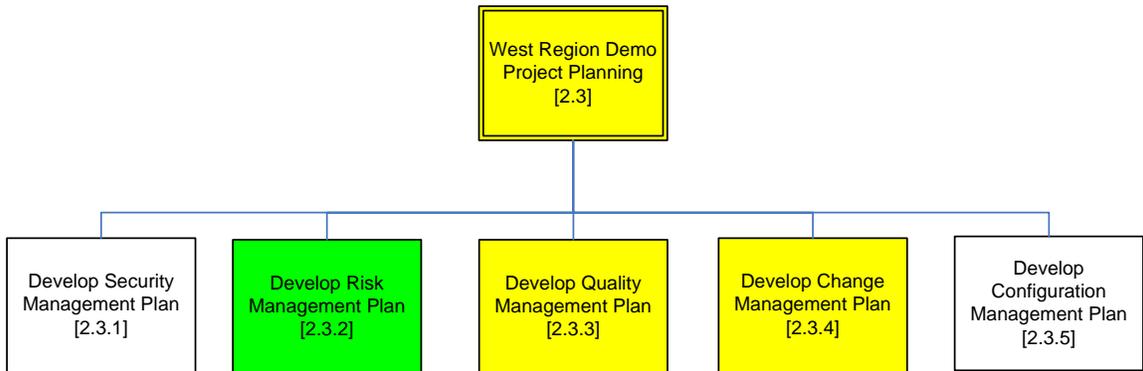


Figure 12: WBS Level 2.3

LEGEND

Not Started Tasks

Partially Completed Tasks

Completed Tasks

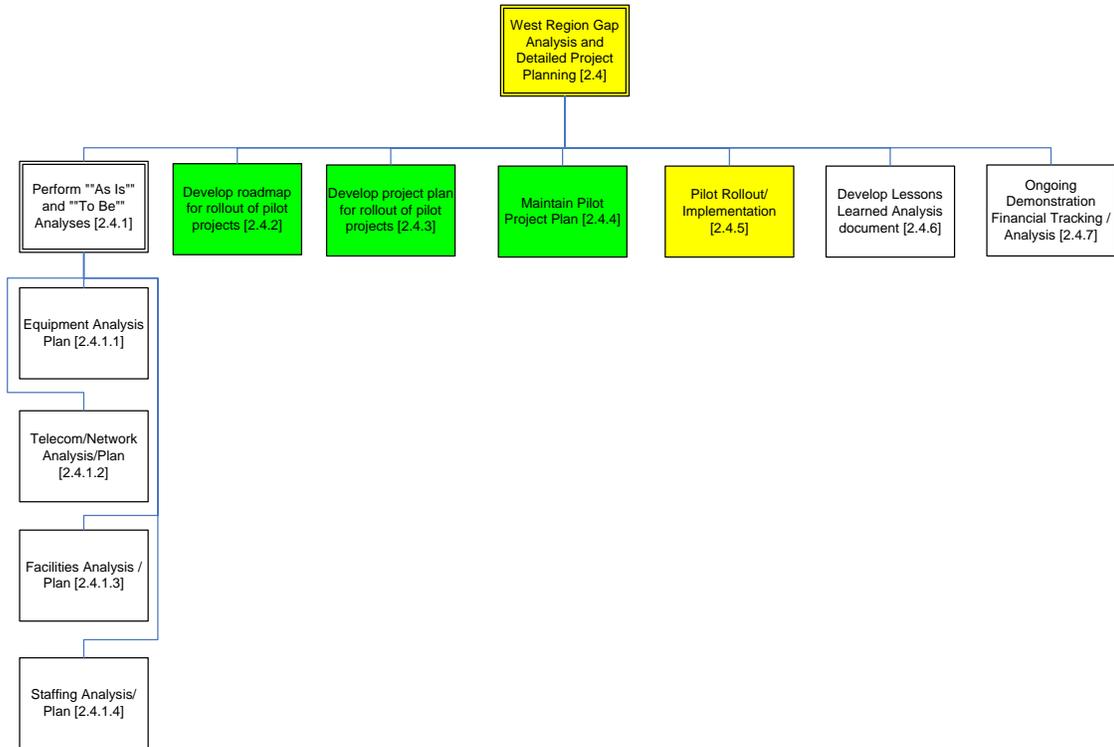


Figure 13: WBS Level 2.4

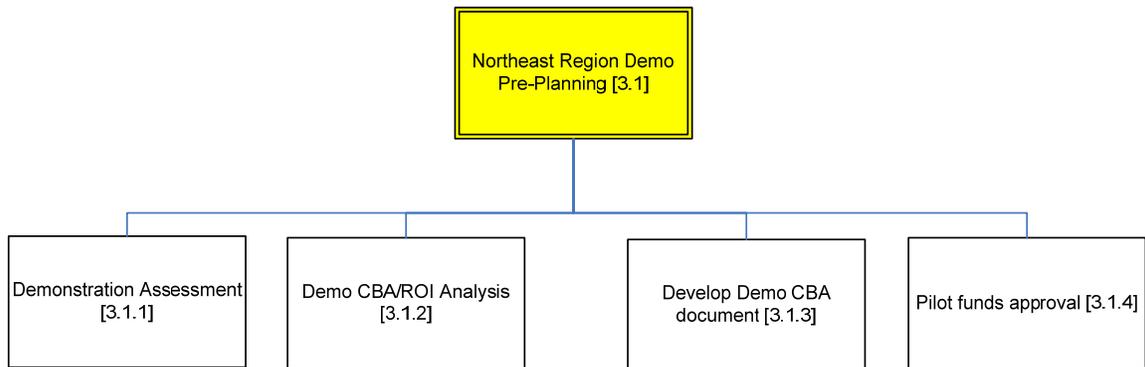
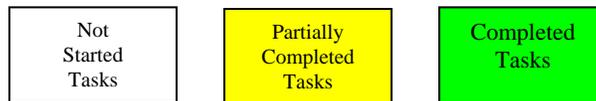


Figure 14: WBS Level 3.1

LEGEND



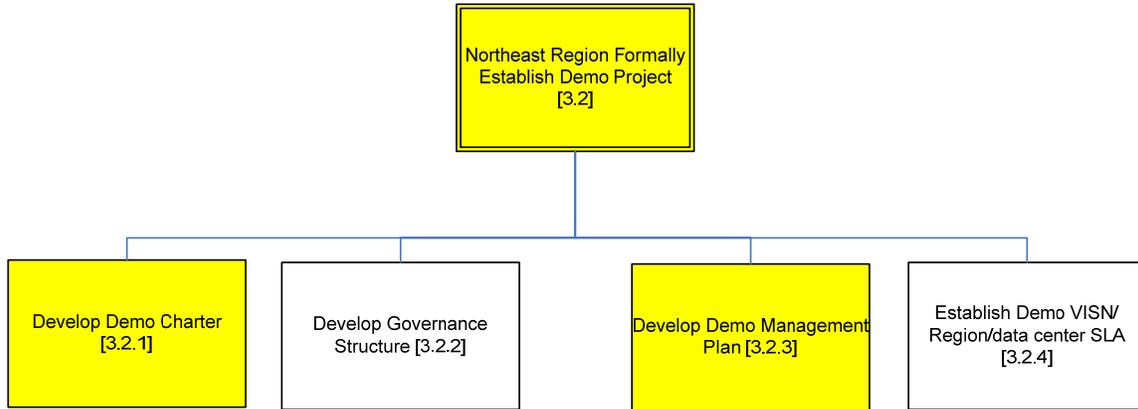


Figure 15: WBS Level 3.2

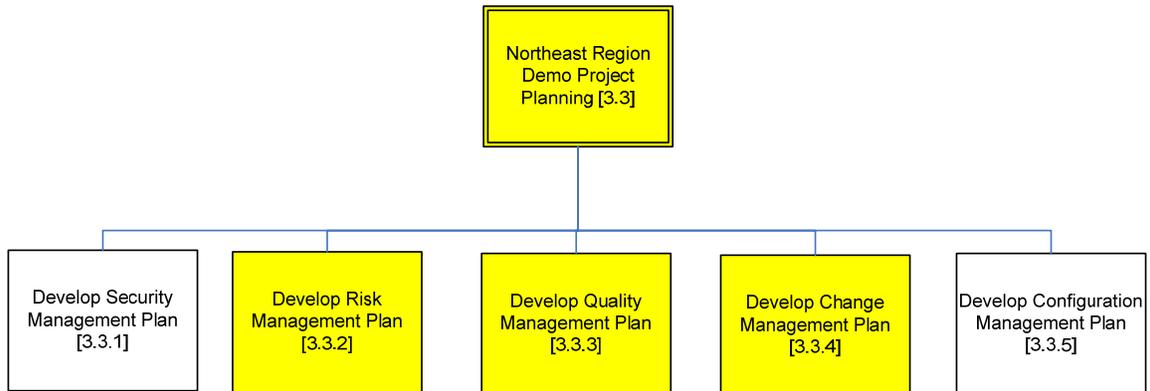
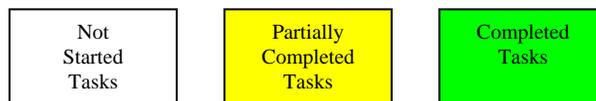


Figure 16: WBS Level 3.3

LEGEND



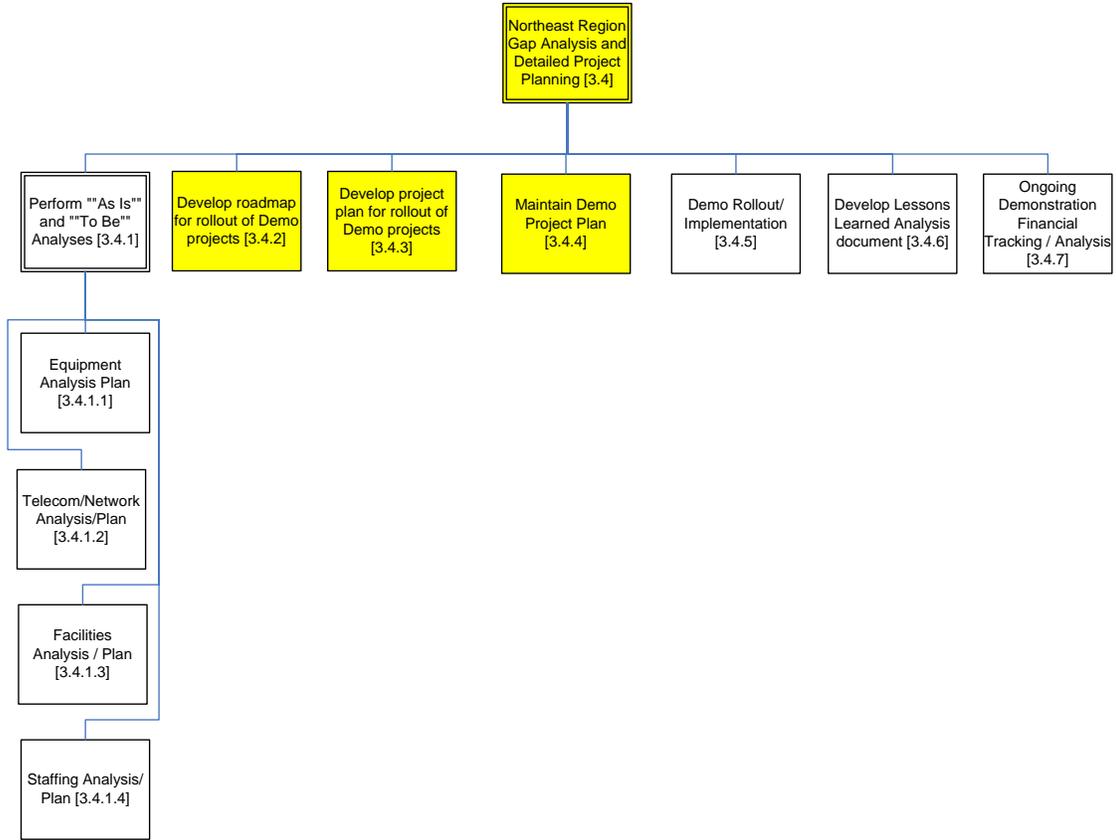


Figure 17: WBS Level 3.4

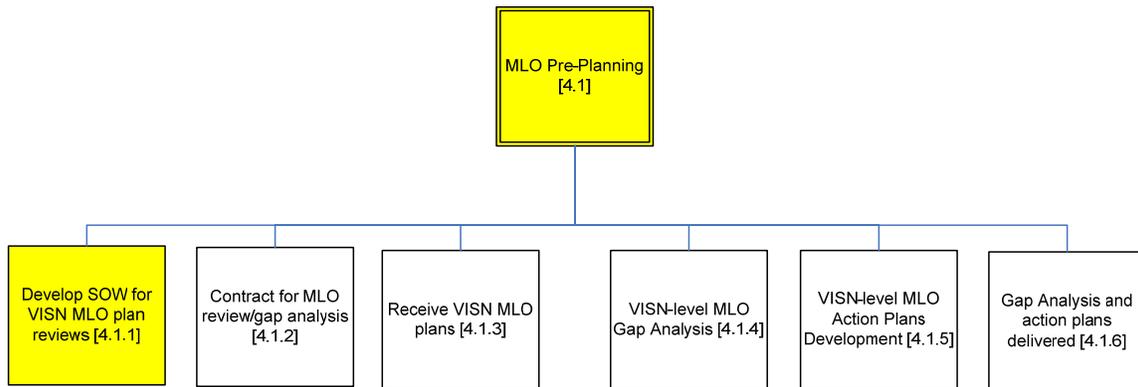


Figure 18: WBS Level 4.1

LEGEND

Not Started Tasks

Partially Completed Tasks

Completed Tasks

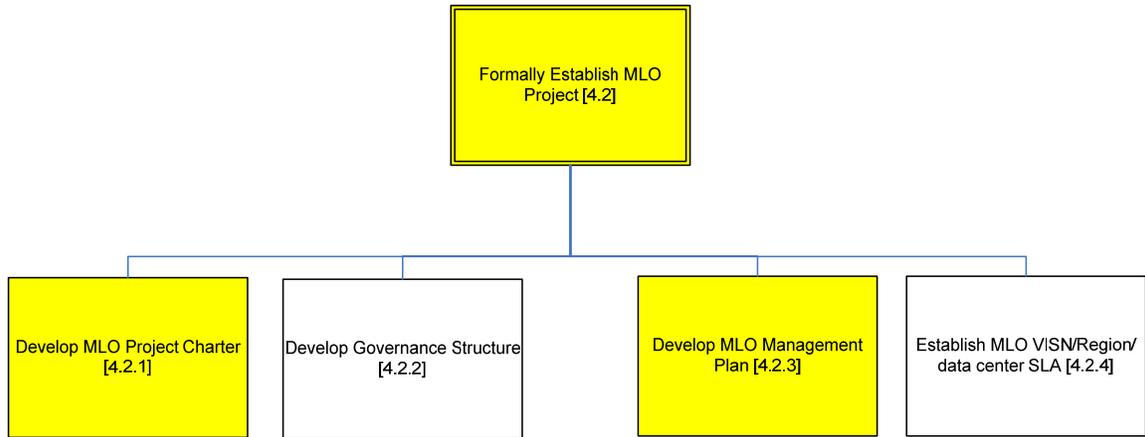


Figure 19: WBS Level 4.2

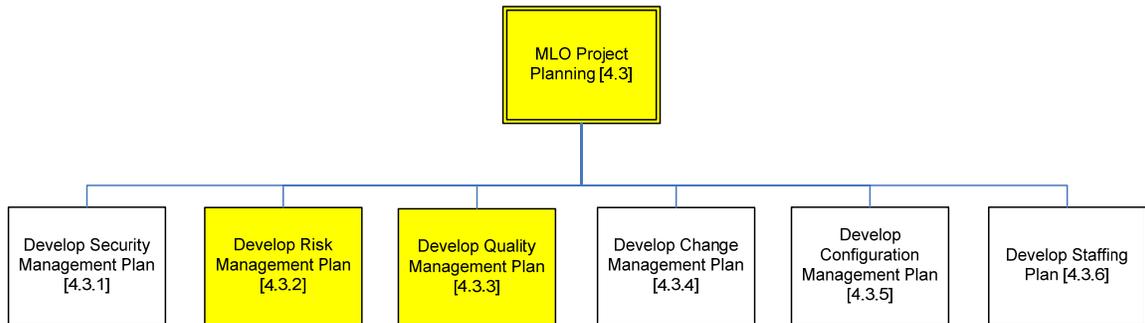
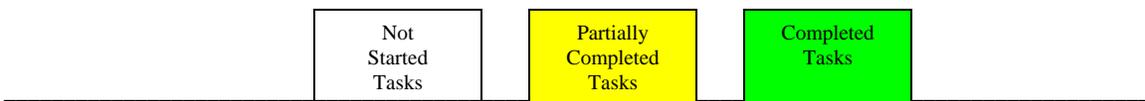
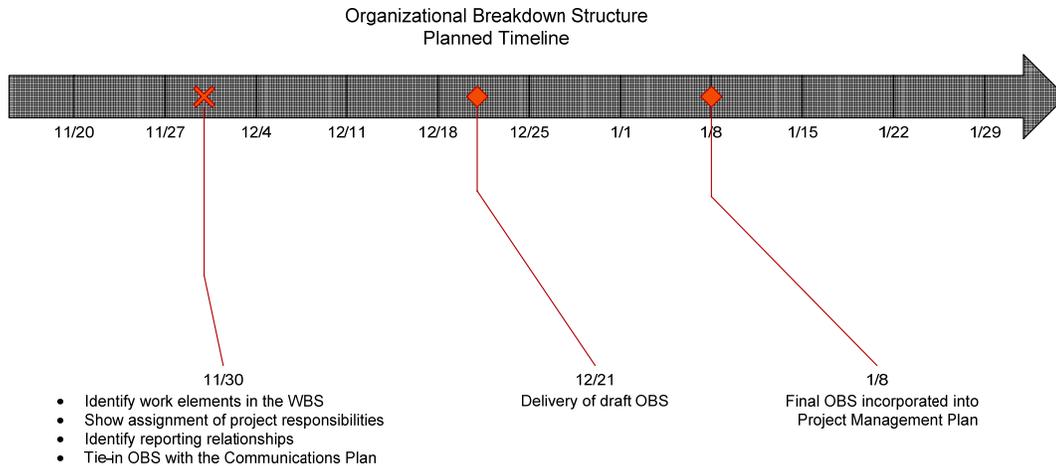


Figure 20: WBS Level 4.3

LEGEND



4 Organizational Breakdown Structure



The Organizational Breakdown Structure (OBS) addresses the idea that each task in the Work Breakdown Structure must be assigned to a team or person. The OBS will mirror the structure of the WBS. Major categories are assigned to a team with a technical lead, while lower level tasks are assigned to groups and individuals within the team. It is important to have a completed WBS, because any task not on the WBS that creeps into the project will become the responsibility of the Project Manager to perform or re-assign to another resource who is likely already working on previously known tasks.

This OBS was set up with the National Project Manager at the RDP Initiative level to oversee and coordinate the entire project. A Regional Program Manager is assigned to specifically oversee the three major regions – West Demonstration, Northeast Demonstration, and MLO. Major sub-groups were developed with a Team Lead for each – Project Management Office (PMO), WAN-related tasks, Vista-related tasks, System-related tasks, etc. The Project Managers, Technical Leads and supporting RDP Management make up the primary leadership team and meet as a group regularly via conference call and in-person meetings.

The Project Managers schedule, assign, and monitor tasks, while the Technical Leads coordinate and review the total demonstration/implementation effort. The Communications team creates promotional material to aid in securing project support. The Risk Management team identifies, captures and manages risk-related issues. The Organizational Change Management team identifies potentially negative change issues and manages them in a positive manner. The Quality Management team is tasked with monitoring various project aspects to insure consistently high levels of performance are maintained. The Project Management Office, in addition, provides both technical and administrative support to the various regions during the Project Demonstrations and MLO Implementation. The PMO is also tasked with managing, at the national level, all project

scheduling and planning to insure each Region remains on track with schedule and cost expectations.

The Organizational Breakdown Structure (OBS) diagram shows the functional relationship between the RDP project organizations and the assigned work components within the project. The OBS is the tool that is used to show which work elements in the Work Breakdown Structure are as assigned to which organizational units. The OBS should show the assignment of project responsibilities and reporting relationships. The OBS is the primary tool for developing the communications management plan and aids in the development of the project schedule.

5 Interim Master Project Schedule

The Interim Master Project Schedule, below, incorporates the project schedules for the Demonstration Projects in addition to a tentative schedule for the MLO Initiative. This master schedule is updated as required and is utilized for tracking task completions, milestones, due dates, resource allocation and measurement of earned value statistics.

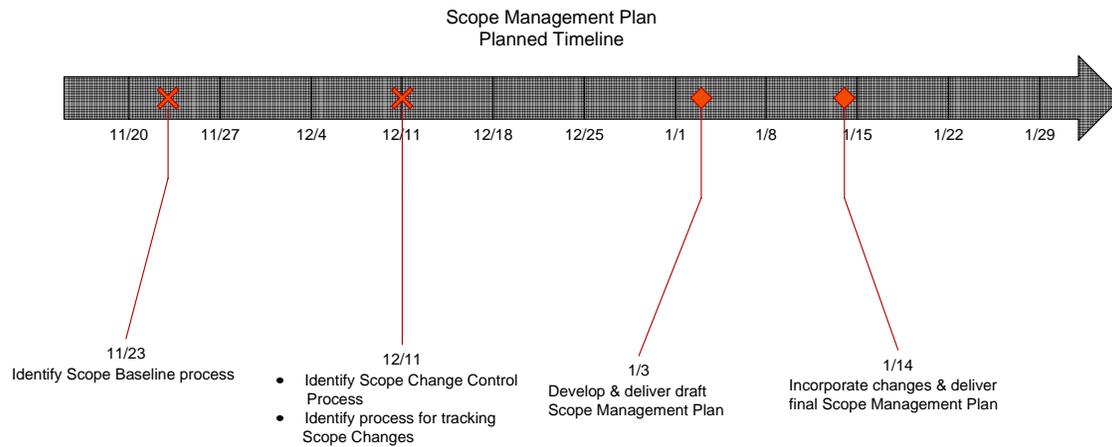
ORGANIZATION	Veterans Affairs
CURRENT DATE	06/01/2006
TITLE	RDP Master Project Schedule
PROJECT START	9/27/2005 8:00:00 AM
PROJECT FINISH	12/14/2007 5:00:00 PM

ID	WBS	Task Name	Start	Finish	Sep 25, '05							Oct 2, '05							Oct 9, '05							Oct 16, '05							Oct 23, '05																				
					T F S S M T W T F S							S M T W T F S S							S M T W T F S S							S M T W T F S S							S M T W T F S S																				
					T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W														
1	1	National Level Project Management tasks	7/19/05	12/19/05	[Summary bar]																																																
2	1.1	Pre-Planning	7/19/05	9/6/05	[Summary bar]																																																
3	1.1.1	Demonstration Assessment	7/19/05	8/15/05	[Task bar]																																																
4	1.1.2	Demo CBA/ROI Analysis	8/16/05	9/2/05	[Task bar]																																																
5	1.1.3	Demo CBA document	9/5/05	9/5/05	[Task bar]																																																
6	1.1.4	Demonstration funds approval	9/6/05	9/6/05	[Task bar]																																																
7	1.2	PMO Establishment / Operations	9/6/05	12/19/05	[Summary bar]																																																
8	1.2.1	PMO Creation	9/6/05	11/18/05	[Summary bar]																																																
9	1.2.1.1	Establish Project Management Office	9/27/05	10/5/05	[Task bar]																																																
10	1.2.1.2	National RDPC - Demonstration Governance Establishment and Refinement	9/6/05	9/26/05	[Task bar]																																																
11	1.2.1.3	National Demonstration Governance document (incorporated into Charter)	9/27/05	9/27/05	[Task bar]																																																
12	1.2.1.4	Develop and Deliver Demonstration Charter	11/14/05	11/18/05	[Task bar]																																																
13	1.2.1.5	Regional Charter creation	9/27/05	9/27/05	[Task bar]																																																
14	1.2.2	PMO Project Management Processes	9/27/05	12/19/05	[Summary bar]																																																
15	1.2.2.1	Develop Metrics Reporting	9/27/05	9/27/05	[Task bar]																																																
16	1.2.2.2	Develop Configuration Management Plan	9/27/05	9/27/05	[Task bar]																																																
17	1.2.2.3	Develop Security Plan	9/27/05	9/27/05	[Task bar]																																																
18	1.2.2.4	Develop Change Management Plan	11/1/05	11/1/05	[Task bar]																																																
19	1.2.2.5	Develop Quality Management Plan	11/1/05	11/1/05	[Task bar]																																																
20	1.2.2.6	Develop Staffing Plan	11/1/05	11/1/05	[Task bar]																																																
21	1.2.2.7	Develop PMO Project Management Plan	10/14/05	10/31/05	[Task bar]																																																
22	1.2.2.8	Project Coordination	10/3/05	10/24/05	[Summary bar]																																																
23	1.2.2.8.1	Organize project files	10/12/05	10/18/05	[Task bar]																																																
24	1.2.2.8.2	Update Share Point	10/19/05	10/24/05	[Task bar]																																																
25	1.2.2.8.3	Internal communications	10/3/05	10/7/05	[Task bar]																																																
26	1.2.2.9	Develop and Deliver Risk Management Plan	10/5/05	11/22/05	[Summary bar]																																																
27	1.2.2.9.1	Perform risk management planning	10/5/05	10/20/05	[Summary bar]																																																
28	1.2.2.9.1.1	Collect historical information	10/5/05	10/6/05	[Task bar]																																																
29	1.2.2.9.1.2	Determine high-level assumptions, constraints	10/7/05	10/10/05	[Task bar]																																																
30	1.2.2.9.1.3	Determine high-level deliverables & estimates	10/11/05	10/12/05	[Task bar]																																																
31	1.2.2.9.1.4	Develop Risk Management Approach document	10/13/05	10/17/05	[Task bar]																																																
32	1.2.2.9.1.5	Present high-level Risk Management approach	10/18/05	10/18/05	[Task bar]																																																
33	1.2.2.9.1.6	Document Risk Breakdown Structure	10/19/05	10/20/05	[Task bar]																																																
34	1.2.2.9.2	Perform risk identification	10/21/05	11/4/05	[Summary bar]																																																
35	1.2.2.9.2.1	Review product documentation	10/21/05	10/24/05	[Task bar]																																																
36	1.2.2.9.2.2	Develop risk identification checklists	10/25/05	10/26/05	[Task bar]																																																
37	1.2.2.9.2.3	Conduct assumption analysis	10/27/05	10/28/05	[Task bar]																																																
38	1.2.2.9.2.4	Gather risk information	10/31/05	10/31/05	[Task bar]																																																
39	1.2.2.9.2.5	Develop RDPC risk register	11/1/05	11/2/05	[Task bar]																																																
40	1.2.2.9.2.6	Update Risk Management Plan	11/3/05	11/4/05	[Task bar]																																																

ID	WBS	Task Name	Start	Finish	Sep 25, '05							Oct 2, '05							Oct 9, '05							Oct 16, '05							Oct 23					
					T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W		T	F	S	S	M
41	1.2.2.9.3	Deliver Risk Management Plan	11/7/05	11/15/05																																		
42	1.2.2.9.3.1	Develop threat response strategy	11/7/05	11/7/05																																		
43	1.2.2.9.3.2	Develop opportunities response strategy	11/8/05	11/8/05																																		
44	1.2.2.9.3.3	Update RDPC Risk Register	11/9/05	11/9/05																																		
45	1.2.2.9.3.4	Document risk-related contractual agreements	11/10/05	11/10/05																																		
46	1.2.2.9.3.5	Update schedule and cost information	11/11/05	11/11/05																																		
47	1.2.2.9.3.6	Develop contingency reserves of time and cost	11/14/05	11/14/05																																		
48	1.2.2.9.3.7	Update Risk Management Plan	11/15/05	11/15/05																																		
49	1.2.2.9.4	Execute Risk Management Plan	10/12/06	10/19/06																																		
50	1.2.2.9.4.1	Develop specs for Risk Database	10/12/05	10/14/05																																		
51	1.2.2.9.4.2	Develop specs for Database reporting	10/17/05	10/18/05																																		
52	1.2.2.9.4.3	Develop RIM's User Guide	10/12/05	10/14/05																																		
53	1.2.2.9.4.4	Hold regular RIM team meetings	10/17/05	10/19/05																																		
54	1.2.2.9.5	Update Risk Management Plan	11/16/05	11/22/05																																		
55	1.2.2.9.5.1	Analyze change requests for risk	11/16/05	11/17/05																																		
56	1.2.2.9.5.2	Perform risk re-assessment, audit, review	11/18/05	11/21/05																																		
57	1.2.2.9.5.3	Document recommendations	11/22/05	11/22/05																																		
58	1.2.2.10	Develop and Deliver Quality Management Plan	12/19/05	12/19/05																																		
59	1.2.2.11	Develop and Deliver Communication Plan	10/5/06	11/14/06																																		
60	1.2.2.11.1	Disseminate plan for review	10/5/05	10/11/05																																		
61	1.2.2.11.2	Receive feedback and incorporate into plan	10/12/05	10/20/05																																		
62	1.2.2.11.3	Deliver plan	10/21/05	10/25/05																																		
63	1.2.2.11.4	Execute the plan	11/1/05	11/14/05																																		
64	1.2.2.11.4.1	Develop website	11/1/05	11/14/05																																		
65	1.2.2.11.4.2	Design newsletter	11/1/05	11/7/05																																		
66	1.2.2.11.4.3	Town Hall meetings	11/1/05	11/7/05																																		
67	1.2.2.11.4.4	Facilitate white papers	11/1/05	11/7/05																																		
68	1.2.2.11.4.5	Draft speeches	11/1/05	11/3/05																																		
69	1.2.2.11.4.6	Facilitate workshops	11/1/05	11/7/05																																		
70	1.2.2.11.4.7	Develop training materials	11/1/05	11/7/05																																		
71	1.2.2.11.4.8	Liaison with VHA	11/1/05	11/7/05																																		
72	1.2.2.12	Develop Project Management Plan	10/24/05	12/19/05																																		
73	2	Western Demonstration	9/27/06	12/14/07																																		
74	2.1	Requirements Gathering	11/1/05	1/20/06																																		
75	2.1.1	Define RDPC Facility Requirements	11/1/05	12/30/05																																		
76	2.1.2	Define Success Criteria	11/1/05	1/20/06																																		
77	2.1.2.1	Develop and Deliver CSF Dashboard	11/11/05	12/16/05																																		
78	2.1.2.2	Gain approval on key success factors	12/23/05	12/23/05																																		
79	2.1.2.3	Develop and Deliver Preliminary Desired Service levels for user end perfo	11/14/05	12/19/05																																		
80	2.1.2.4	Conduct as-is assessment of user end performance	1/20/06	1/20/06																																		
81	2.1.2.5	Conduct testing for end user performance using tool	1/13/06	1/13/06																																		
82	2.2	Architecture Design	10/17/06	6/30/06																																		
83	2.2.1	Preliminary design - Plan and Develop Target Architecture	10/17/06	1/16/06																																		
84	2.2.1.1	Select and assign Subject Matter Experts to develop network model	10/17/05	12/16/05																																		
85	2.2.1.2	Select and assign Subject Matter Expert(s) to develop network model, ser	11/15/05	12/9/05																																		
86	2.2.1.3	Select and assign Subject Matter Expert(s) to develop database/storage m	11/30/05	12/16/05																																		
87	2.2.1.4	Select and assign Subject Matter Expert(s) to develop security model	11/15/05	1/9/06																																		
88	2.2.1.5	Select and assign other SMEs as needed for Service Management Model	12/1/05	12/23/05																																		
89	2.2.1.6	Develop Model (Network model, server model, storage model, security mo	11/15/05	12/30/05																																		
90	2.2.1.7	Prepare and Deliver Preliminary Design (including architecture models, COI	11/15/05	1/16/06																																		
91	2.2.1.8	Define Service Management Framework/Service Team Construct	11/11/05	12/30/05																																		
92	2.2.1.8.1	Define services to be included in RDPC (LAN, WAN, etc.), who are st	11/15/05	12/30/05																																		
93	2.2.1.8.2	Develop draft model of SLAs for initial discussion	11/11/05	11/18/05																																		
94	2.2.2	Detailed Technical Design	12/19/06	6/30/06																																		
95	2.2.2.1	Document overall consolidation strategy (including consolidation sequenc	1/9/06	1/20/06																																		
96	2.2.2.2	Develop acquisition plan for h/w and software (including upgrades)	1/31/06	1/31/06																																		
97	2.2.2.3	Develop and Deliver Detailed Technology Plan	12/19/05	2/10/06																																		
98	2.2.2.4	Develop and Deliver Service Management Plan	12/19/05	1/31/06																																		
99	2.2.2.5	Develop and Deliver Test Plan for each VSN	2/1/06	2/1/06																																		
100	2.2.2.6	Develop and Deliver Staffing Model for RDPC	2/9/06	4/24/06																																		

Figure 21: RDP Master Project Schedule

6 Scope Management Plan



Scope Management Plan Purpose

The Scope Management Plan describes how the project scope will be managed and how scope changes will be integrated into the project. It addresses the likelihood of scope change within the project and how changes will be identified and classified. The Scope Management Plan should include an assessment of the amount and type of scope changes anticipated as progressive elaboration is used to define the project output. More formalized processes of Scope Management are normally used on larger projects in which the likelihood for scope creep or changing requirements is greater.

Scope management includes monitoring and controlling what the end product of the project will be. The objective during the project planning process is to define specifically and completely the total scope of the project. The objective of the Scope Management Plan is to make certain that the project scope is delivered.

Scope changes are common in projects, especially complex projects, as more information and detail become available during project planning and execution. The Scope Management Plan describes the process that project will follow to implement scope changes. The process should include how and by whom a change is initiated, how and by whom the change is assessed, and how and by whom the change is integrated into project documentation. The process used to document and report the impact the change will have on other aspects of the project, especially cost and schedule, should be also be included in the Scope Management Plan. Specific reference should be made to the integrated Change Control Process contained in the integrated Change Management Plan.

The project work breakdown structure (WBS) is the primary tool for depicting and controlling the scope of the project. Project Scope Management is accomplished through integrating the Project Scope Statement, establishing a scope baseline, and managing a change control process. Project Scope Management involves communicating the scope baseline and the scope change control process which contains the steps the Project Manager should take to get scope changes approved and recorded. In addition, the change management process should contain an assessment of what constitutes a scope change on the project and the likelihood of changes affecting the scope of the project.

Implementing Scope Management

This simply requires that the scope is monitored for any changes, expansion in scope demands or requirements and that any change is identified and documented. Any scope change is then brought under the change control process and evaluated accordingly.

Scope creep (typically a slow, gradual or incremental expansion of project scope) is a common problem resulting from not monitoring and controlling project scope. The Project Manager and team must be aware of and vigilant about meeting scope requirements but not allow the project scope to expand without planning or control. Scope creep can be costly in terms of direct cost, time, required resources or change in quality.

Projects are dynamic efforts and as such change is inevitable. One of the greatest challenges to a project's success is controlling the impact of change or managing changes to the benefit of the project objectives. By accepting the fact that change will occur and planning for the management of change, the probability of project success is increased and enhanced.

Any change in an area of a project will have impacts on other dependent areas. A change in schedule can cause an increase in cost, a change in available resources, or impact the schedule for delivery of a critical component. Risk events could change in probability of occurrence or severity. A change in scope could alter the entire project plan in terms of cost, schedule, resources, or quality.

By planning and implementing a disciplined, systematic change control process, change can be effectively managed; impact can be fully comprehended and informed decisions made without endangering the project objectives or customer expectations. In fact, in many cases, change is a necessary process as project information becomes available. A project's objective is not to simply meet the letter of the scope statement but to provide a product or service that meets the needs and requirements of the customer. As a project proceeds it may be evident that the end result of the execution of the project plan will miss the "need" target of the customer and the plan will need refinement or correction to get it back on track.

The Change Control Plan establishes the processes, procedures and responsibilities for identifying, evaluating and managing change. Integration is achieved by assessing a potential change's impact to all relevant aspects of a project, primarily scope, cost, schedule, risk and quality.

Due to the size, complexity, and visibility of this project, it is recommended that a Change Control Board (CCB) be established to review and evaluate a change. This body is responsible for ensuring that change is managed, that negative impacts are minimized and that the project objectives remain the focal point. In some instances there may be more than one board especially

when highly technical deliverables are involved. A Technical Review Board (TRB) or Engineering Review Board (ERB) may be established in addition to the project CCB. These boards may be subordinate to the CCB with final review and approval by the CCB. The project team must assess the project and plan the organization and structure to meet the needs of the project.

We will use Clear Quest for collecting, assessing, monitoring, and integrating changes. Project Managers are accountable for ensuring that all changes for their regions are added to this system. Project Managers will also provide input for assessing and monitoring changes in their region. The PMO is responsible for further assessing and monitoring changes, along with integrating changes into the enterprise project.

Scope Baseline

An approved scope statement and the finalized WBS become the functional baseline for planning and control. Changes to the baseline requirement will almost always lead to program problems, increased risk, and delays in delivery. The requirements baseline will drive the project's budget, timeline, and viability. It bears repeating that getting the requirements right the first time is the single most important step in ensuring a smooth, trouble free project. Once the functional baseline has been developed and approved, the Project Manager can generate a baseline schedule and baseline cost data. These baselines, once presented to decision making authorities and approved, becomes the contract between the Project Manager and the customer for the delivery of the proposed system or products. The baseline can be converted into a graphical representation for tracking, briefing, and high level overview of project status. Below is an example of graphic baseline representation. This sample will be updated once actual data is available.

SAMPLE BASELINE FOR PROJECT



This graph shows the total baselined cost of the project (\$4200), the cumulative amount baselined to be spent by unit of time or phase, and the relative amounts planned to be spent.

Funds planned for time between 4 and 5 are significantly greater than others.

Figure 22: Sample Baseline for Project

Once schedules and work packages have been folded into the project plan, the tracking of cost and task accomplishments can be performed and plotted along the baseline to discover variances, overruns, and problems in need of closer examination. This will be updated as data becomes available.

ACTUAL/BASELINE FOR PROJECT

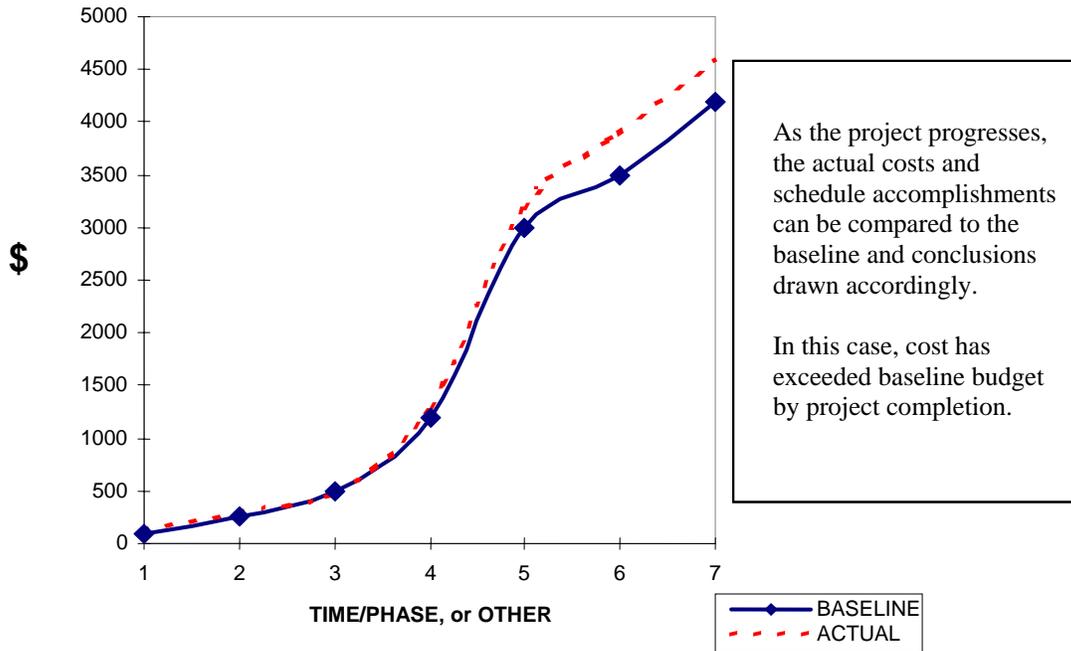


Figure 23: Actual/Baseline for Sample Project

Scope Change Control Process

The Change Control Plan must be comprehensive and should be concise. The plan does need to address all aspects of change control to ensure complete evaluation of change and enable managed decision-making.

The risks associated with such “scope creep” are driven by the size of the proposed change and the point along the development process it is inserted. A rule of thumb in project management is that the first 10% of decisions drive 85% of a programs cost. It is understood that for many reasons, a change to the scope baseline may become unavoidable.

Resource constraints, technology innovation, political considerations can all affect the original plan. Accordingly, a method for identifying, documenting, approving and implementing required changes should be established and adhered to in order to reduce the risk associated with such actions. Establishing a scope baseline, at a specific point in the development cycle is recommended.

Change proposals surfacing after that event or date being held in abeyance until the next planned upgrade, should be considered. The use of project review meetings and informal communications to identify needed changes is encouraged, but these forums are inappropriate for approval of changes. The authority to approve and record changes to the project and functional baselines is

vested in the decision authority. The detailed process of formulating, approving and implementing changes is illustrated in the figure below.

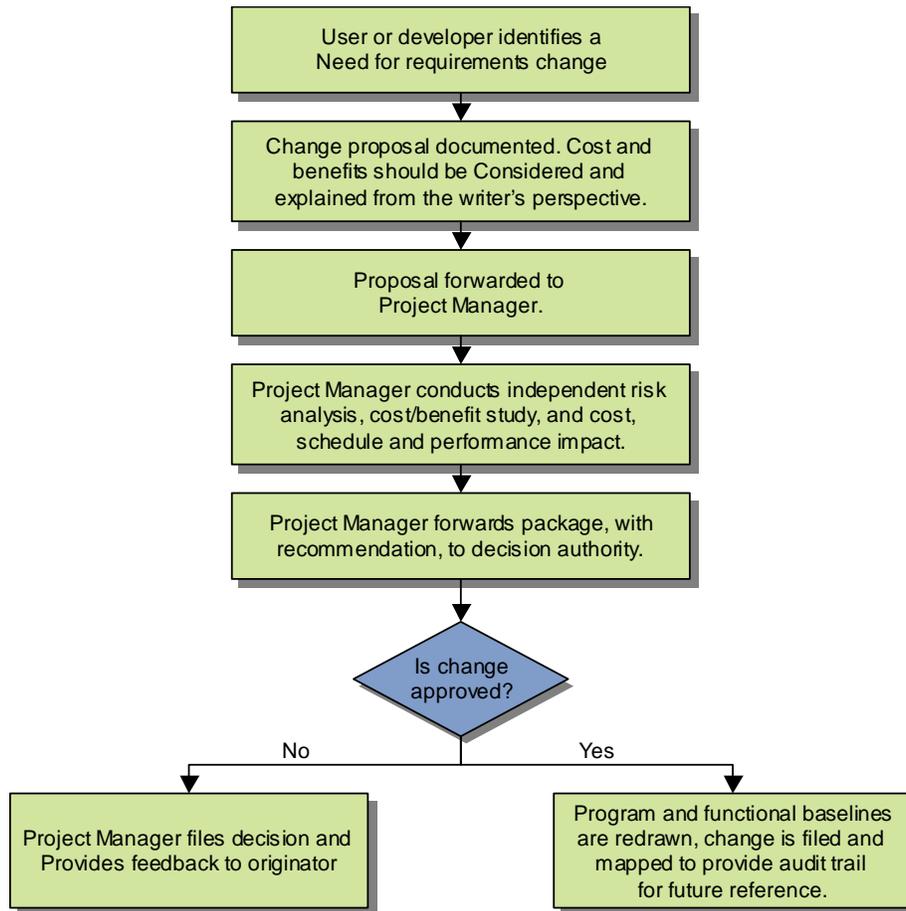


Figure 24: Notional Change Request/Approval Process

Implementing the Integrated Change Control Management Plan

Identified changes in scope, cost, schedule, risk and quality are managed according to the Change Control Process. The project team must be disciplined about recognizing and managing change. Project success is dependent upon the implementation of change control processes that provide review, approval and communication of change and its impact.

7 Organizational Change Management

Purpose

The Organizational Change Management (OCM) Strategy for the VA RDP Project articulates a high level Change Management approach and basic activities to support each of the co-location efforts (OCM activities will be tailored and adjusted within each Region as necessary). It explains the link between OCM, Communications and Training efforts – all of which must work in concert to prepare impacted stakeholders for upcoming changes. Additionally, the strategy offers a proposed organizational structure designed to support effective OCM planning and execution to support the RDP program through its various transitions.

These OCM activities will improve the likelihood of a smooth, seamless transition to Regional data centers in support of the goals for the project. The OCM Strategy also documents the required OCM infrastructure necessary to support implementation. The OCM Strategy:

- Offers a deliberate approach to organizational change management to address and minimize conflicts between stakeholder communities of interest
- Offers a process by which to align identified OCM liaisons behind a consistent view of the organizational vision and structure

The successful implementation of the Organizational Change Management Strategy will yield the following benefits:

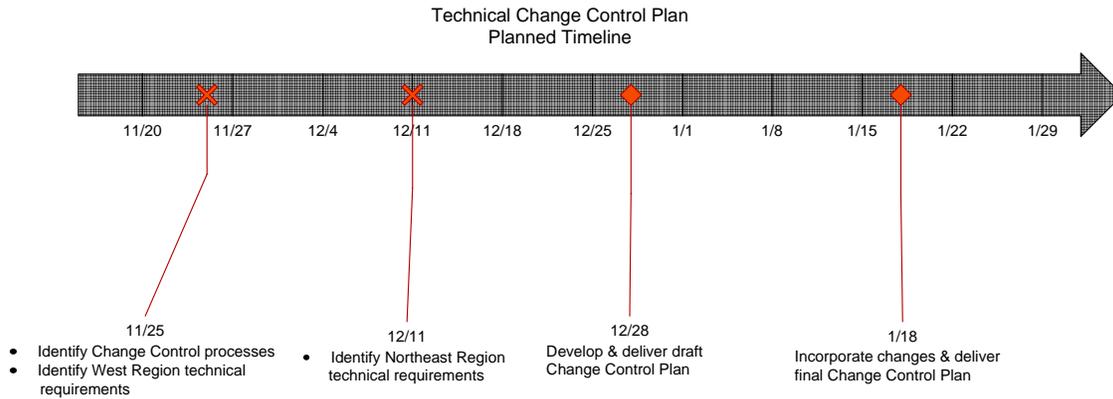
- Reduce risks associated with stakeholder/customer behaviors that could thwart the initiative;
- Gain buy-in and promote acceptance of the new operating model;
- Achieve successful results from the new organizational structure.

Link to Plan

The most recent version of the OCM Plan is contained on the PMO Internal Share Point Site <http://vaww.infoshare.va.gov/NationalRDPC/PMO-Restricted/Organizational%20Change%20Management/Forms/AllItems.aspx>

This document describes the OCM strategy, basic suite of work products and activities that should occur in each Region and their purpose, and describes a proposed structure for implementing these activities in a collaborative manner.

8 Technical Change Control Plan



Purpose of Technical Change Control Plan

The Technical Change Control Plan establishes the processes, procedures and responsibilities for identifying, evaluating and managing change to technical requirements. Each potential change must be reviewed to assess its impact to all relevant aspects of the project, primarily scope, cost, schedule, risk and quality.

Any technical requirements change will have impacts on other dependent areas. A change in implementation schedule can cause an increase in cost, a change in available resources, or impact the schedule for delivery of a critical component. Risk events could change in probability of occurrence or severity. A change in scope could alter the entire project plan in terms of cost, schedule, resources, or quality.

By planning and implementing a disciplined, systematic change control process, change can be effectively managed, impact can be fully comprehended, and informed decisions made without endangering the project objectives or stakeholder expectations.

Change Management Activities

The following change management activities comprise the change control process:

- Change identification: Recognizing that a change has occurred or needs to occur

- Review and approval: Establishing processes and procedures for formal change review and authorization of changes
- Documentation of change process: Managing the approved changes and regulating the flow of requested changes
- Baseline control: Maintaining the integrity of baselines by releasing only approved changes into the project, and maintaining configuration documentation
- Project plan updates: Controlling and updating the scope, cost, budget, schedule, risk, and quality requirements upon approved changes
- Documentation of impact: Recording and documenting the impact of the changes on all aspects of the project

Change Control Board

Because of the size and complexity of the RDP project, it is recommended that a Change Control Board (CCB) be established to review and evaluate a change. This board will review and evaluate changes, and be responsible for ensuring that change is managed, that negative impacts are minimized and that the project objectives remain the focal point. This board will serve as the decision authority in the process documented below. The project manager will provide this board with the description of the proposed change, an independent risk analysis, cost/benefit study, and estimates of cost, schedule, and performance impact using the Change Control Request form provided in Appendix B.

Review and Approval Process

It is important to understand that while project review meetings and informal communications can identify needed changes, these forums are inappropriate for approval of changes. The authority to approve and record changes to the project and functional baselines is vested in the decision authority. The detailed process of formulating, approving and implementing changes is illustrated in the following diagram:

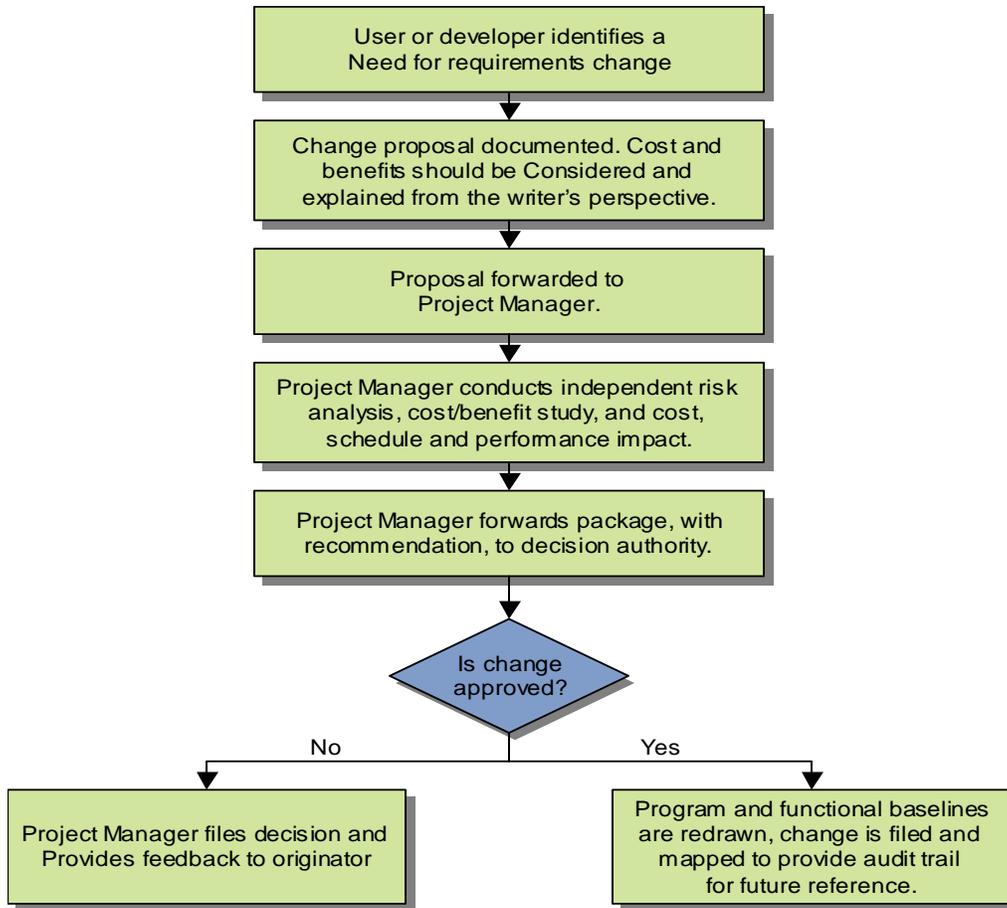


Figure 25: Notional Change Request/Approval Process

This diagram begins with the identification of a need for a change, which is documented to provide a description of the nature and extent of the change, combined with an estimate of the costs and benefits as understood by the change requestor. That proposal is then forwarded to the Project Manager for independent review and study of risk, cost, benefits, and impact on project schedule and performance. At that point the change is forwarded to the CCB for review and decision; if the change is disapproved, the Project Manager records the justification and notifies the originator; if the change is approved, the Project Manager makes any required baseline changes to program and functional baselines and maps those changes back to the approved change.

Change Thresholds

The Technical Change Control Plan will describe the limits that trigger the change control process for scope (WBS), cost, and schedule adjustments. The change thresholds for a project baseline deviation will be determined for 1) technical changes in scope or performance which affect technical requirements and are not in conformance with the currently approved project

plan; 2) schedule changes greater than a certain duration, or those which affect the project completion date; and 3) net cost increases to the total project cost in excess of a determined percentage (cumulative) of the original cost baseline.

Change Identification, Documentation, Implementation and Reporting

The change control form provided in Appendix B forms the basis of the key documentation required to track each change request. The project manager completes this form, providing a description of the proposed change, an independent risk analysis, cost/benefit study, and estimates of cost, schedule, and performance impact, and forwards this risk to the change review board.

Automated Tools to Manage and Track Changes

The SharePoint project portal serves as the automated tool used to manage and track changes. This portal is used as the repository of all project planning documents, will manage and track changes to all documents, and will always contain the latest versions of cost estimates, project schedules, and cost benefit information.

The SharePoint project calendar will display all meetings of the Change Control Board, as well as copies of the agenda for each CCB meeting. After this board has approved each change, the Work Breakdown Structure, the project schedules, and any budget/cost documents will be updated with approved changes.

Changes which affect the project baselines will be reported during the Monthly Performance Reporting Process, and those which affect cost and schedule performance will also be addressed through Earned Value Reporting.

Configuration Management

For a project as complex as the RDP consolidation, thorough configuration management is essential to be able to successfully migrate the system from an initial state through completion. Configuration management involves identifying the configuration of a system at given points in time, systematically controlling changes to the configuration, and maintaining the integrity and traceability of the configuration throughout the lifecycle. The items placed under configuration management include the software and hardware products that comprise the RDP network and infrastructure as well as items required to create or maintain these products. Proper configuration management enables an organization to answer questions about

- The process for making changes to the network and infrastructure
- The person or group responsible for a network and infrastructure change

- Details of the changes that were implemented
- Timing and audit trail for the changes
- Justification for the changes
- Authorization of the changes

The key steps involved in implementing configuration management are as follows:

Determining Configuration Management Organizations and Responsibilities

In this stage, the responsibilities for each area of Configuration Management are identified, including such areas as Architecture, Operations, and Deployment. As an example, in the Northeastern region, working groups have been formed for Network (routing, data center management, IP addressing, infrastructure), VistA (Application implementation, tuning, clustering, data migration and replication), and NOS (Network applications such as DNS, Active Directory, and Exchange).

Configuration identification

Configuration identification (CI) involves identifying the components of the network, uniquely identifying the individual components, and making them accessible in some form. A proper configuration identification schema identifies each component of the network and infrastructure and provides traceability between the component and its configuration status information. Proper configuration identification answers questions about the configuration of the network, the components of the network, and the versions of the network components.

The major activities of configuration identification are:

- Selecting network components to be placed under CM control
- Creating an identification scheme for the components to uniquely identify each individual component

Configuration Change Control

Configuration change control involves controlling and managing the changes to the network and infrastructure. The goal of change control is to establish mechanisms that will help ensure the integrity of the network and infrastructure. Proper configuration change control answers

questions about which network components are controlled, how changes to the network are controlled, and who controls the changes to the network.

The major activities of configuration change control are:

- Defining and documenting the change control process
 - Identifying and classifying what constitutes changes to the network
 - Evaluating what components in the current network configuration need to be changed
 - Testing or modeling the impact of the change upon the current network
 - Implementing the change if it is approved
- Identifying and maintaining network configuration baselines (capturing an approved snapshot of the network and its components at a given point in time)
- Identifying and controlling network changes

Configuration Status Accounting

Configuration status accounting involves the recording and reporting of the change process. The goal of configuration status accounting is to maintain a status record of all items in the network baseline, thus providing traceability of all changes to the network. Proper configuration status accounting answers questions about what changes have been made to the system, when were they made, and what components were affected by this change.

The major activities of configuration status accounting are:

- Identifying the configuration status information to be recorded
- Maintaining a record of configuration changes
- Reporting the status of network configuration management

First-tier, architectural configuration status information will be recorded and maintained in a centralized repository containing the inventory of network components and their status, as well as the proposed and implemented changes to the network. Second-tier, component configuration status information will also be recorded and maintained. Regardless of their form, configuration elements must be easy for network personnel to access so that they may record what they did to the component at the same time they performed the action.

Since the configuration status information is crucial to ensuring the integrity of the infrastructure baseline, its components, and the CM process, only authorized personnel should update this data.

The Change Control plan will identify the specific personnel authorized to update the status information changes and the specific changes that each person is authorized to make.

Regular monitoring of the configuration status information will enable the identification of trends and potential trouble spots in the network. The Change Control plan will outline the reports required and review timeframes for performing this analysis.

Configuration Reviews

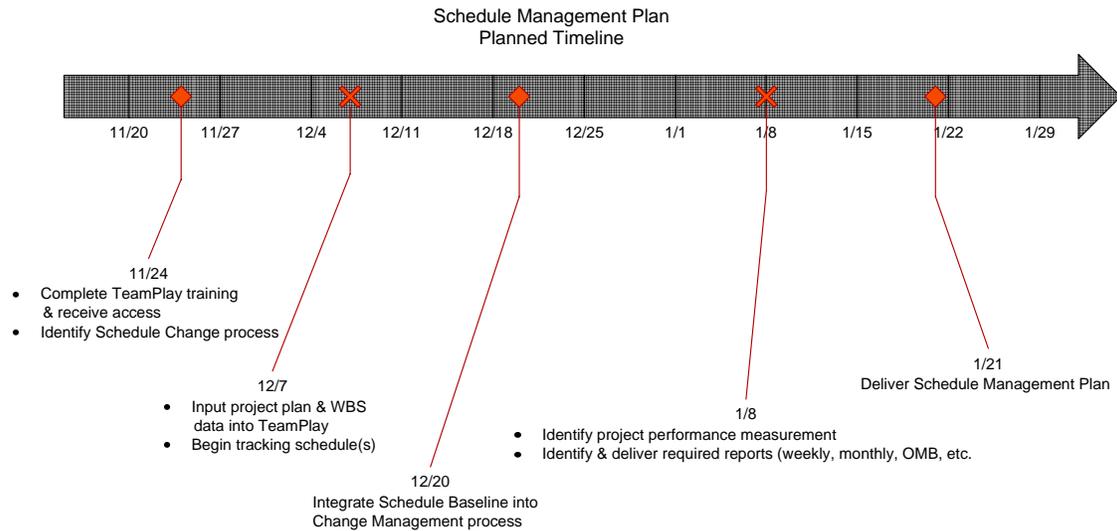
Configuration reviews will be performed periodically to verify the correctness of the configuration status accounting information. The goal of a configuration review is to verify that all network components have been correctly identified and that all network changes have been properly managed. Periodic configuration reviews will also enable assessment of the effectiveness of the CM process and the identification of potential modifications. Proper configuration reviews answer questions about whether the configuration status accounting records are accurate and complete and whether the configuration management process works effectively.

The major activities of a configuration review are:

- Identifying the information to be reviewed and performing the review
- Documenting and analyzing the results of the review

The configuration review analyzes and notes any discrepancies between the configuration status information and the physical network and infrastructure. This is a detailed review which compares the data in the repository with the actual physical configuration of the deployed components.

9 Schedule Management Plan



Schedule Management Using TeamPlay

Project Tracking and Reporting

Primavera provides an environment easily accessible for executive management to use when reviewing project data, as well as the capability for tracking project status and progress.

Primavera will be used to capture the following information:

- Work Breakdown Structure (WBS) Milestones and Activities
- Budget and Expenses
- Risks and Issues with Corrective Actions and Mitigation Strategies
- Performance Measures
- Project Documentation and Project Work Products
- Resource Time and Allocation

Primavera TeamPlay is the program used for schedule management and tracking of status, costing, earned value, etc. Maintaining and updating a project schedule involves the following steps.

Establish Project Baseline

Project Baselines are a snapshot of the state of the project at a particular date and time. It is the reference used by the tool, and the Project Manager, to determine if a variance exists from when the baseline is established (start of project) when compared to the current project status (tracks a project's cost and schedule performance).

Review and Approve/Reject Timesheets

The purpose of Timesheets is to allow project team members to communicate the status of their activities to the Project Manager. This data is then used by the tool to record progress and calculate earned value information.

Apply Actuals

The application of actuals updates the project's status based on information included in approved timesheets. It is recommended that the Responsible Manager apply actuals to one project at a time to ensure that a notification of outstanding timesheets is generated. It is necessary to resolve a resource's timesheet deficiencies before completing the "Apply Actuals" process, which may include rejecting timesheets. If a resource is active on multiple projects, each Project Manager must approve the resource's timesheet before any Project Manager can apply actuals.

Manually Enter Project Actual and Remaining Costs

Some expenses, such as Firm Fixed Price contract payments/invoices, must be manually entered. For each activity that has incurred costs, the Project Manager must enter the cumulative actual cost as of the Data Date. The Remaining Cost value may need to be revised if it is not automatically computed

Schedule the Project

Schedule the project to determine how long the project will last and when activities will occur relative to the project or activity calendar.

Update Progress of Project

Once actuals have been applied and the project has been rescheduled, review the status of each activity that has started. The "Units %" complete field should be automatically calculated depending on the % complete type chosen, except for "Physical %" complete when steps are not present. If this field has not been updated, the Project Manager must manually enter the "Physical %" complete data. The Project Manager must start the activity in order to modify the "Physical %" complete. If the activity is 100% complete, the Project Manager must check the "Finished" box for all percent complete types.

Schedule Change Management Process

The schedule change management process involves the utilization of a schedule baseline. This baseline provides a point of reference from which any future schedules changes are measured against. An initial baseline is established with the schedule once all tasks have been delineated but project work has not yet begun. Additional baselines may be called for to demark significant events in the project and percent completion of tasks at the time of those events.

Any proposed schedule changes, adjustments or additions will be compared against the current baseline as an indicator of the effect upon the entire schedule. This process of review involves all relevant stakeholder and the authorization process requires approval of the Project Manager,

Change Board, Management, etc. This schedule change process is closely integrated within the project's overall change management process.

10 Staffing Management Plan

The ability to plan and manage project resources is required to deliver a project. This is accomplished through a plan that defines the project organization, resource planning (people) and process for managing project staffing. It describes when and how human resources will be brought onto and taken off of the project.

Typically, the process of identifying project team members and stakeholders is completed early in the project planning phase. This not only involves identifying individuals but also the roles and responsibilities for each.

The structure of the RDP Program organization supports its mission and objectives. Figure 1 depicts a high-level view of the RDP Project.

RDP Organization Chart

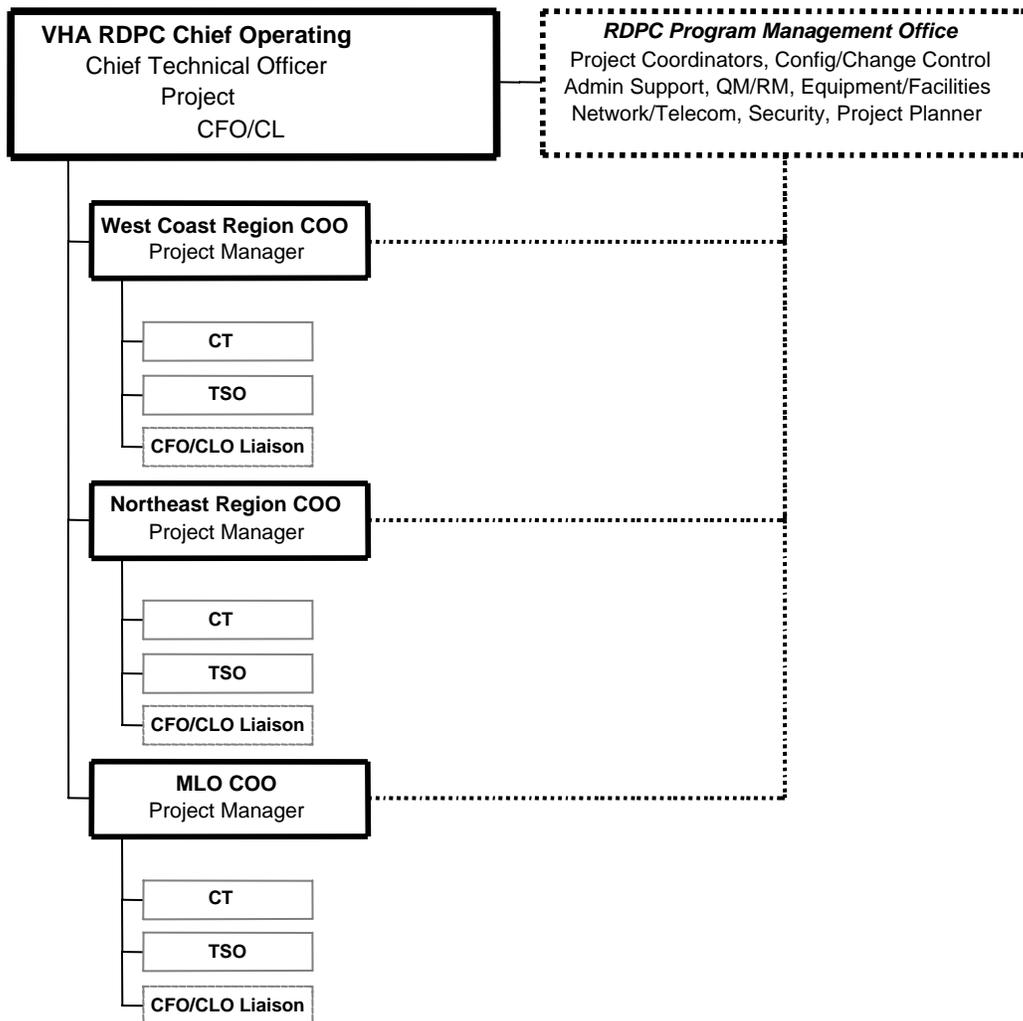


Figure 26: RDP Organization Chart

With a basic foundation in place, additional expertise will be leveraged to support the MLO initiative, enhance the organizational change management elements, and fully support the security planning. During this Phase, the Team will supplement the objectives outlined for Phase I with additional focus on the following:

- Formally establish the MLO Initiative by outlining a charter, governance structure, and adapting the processes identified for the Regional Demonstrations.
- Fully support the project management requirements of the Regional Demonstrations
- Expand the analysis of the organization change management issues at the Regional Level
- Incorporate Security issues into the analysis, planning, and rollout at all level of the RDP Initiative

Phase II of the RDP Initiative adds to the foundation established in Phase I by fully supporting the Regional Demonstrations and the MLO. Phase II also provides the security expertise needed to fully analyze the security implications of the RDP analysis, planning, and rollout.

In Phase III, additional resources are added to support the increased volume of activities anticipated as the Project focuses to finalize the implementation plan – including a detailed facility-level assessment of the impact of migration from the current environment to the Regional Data Processing Center environment. During this Phase, the Team will supplement the objectives outlined for Phase II by focusing on the following:

- Fully support the facilities / network management element of the RDP Initiative
- Fully support the administrative element of the project at all levels

Project Organization and Responsibilities

There are a number of different organizations and/or “stakeholders” that are involved with the RDP Project. Some, like the PMO, have a daily, direct involvement. Others may have a more limited role. Following are the relevant organizations involved in the project:

- **VHA RDP Chief Operating Office (COO)** – The COO will be the primary business owner of the RDP initiative – and will be the responsible party and primary interface to the RDP sponsors and stakeholders. Responsible for overall leadership of the RDP effort – including the oversight and management of the Project Management Office (PMO), coordination between the regional demonstrations and the MLO. Develops the overall strategy and approach for analyzing the alternatives and developing a plan for implementing the RDP rollout. The COO reports to VHA/VA and would Chair the National Regional Data Processing Center Governance Council which serves as the overall governance body responsible for oversight of the RDP initiative.

- **RDP National Project Management** – Responsible for ensuring consistency / congruency in the planning, analysis, and execution of the RDP elements across the each of the Regional Demonstrations and the Regional MLO rollout. Works closely and supports the activities of the VHA COO, the Regional Demonstration COOs, and the Regional MLO COOs. Provides direction, coordination, and oversight to the Project Management Office, and coordinates the activities of the Regional Demonstrations – and MLO, once established.
- **RDP National Chief Financial Officer (CFO)** – Serves as a critical liaison to the RDP initiative and provide subject matter expertise on the financial impact of the RDP initiative on the ongoing operations of the VHA IT infrastructure. Coordinates and directs the work of the Regional RDP CFOs and support the National COO in planning, analyzing, and implementing the critical elements.
- **RDP National Chief Liaison Officer (CLO)** – Coordinates the required subject matter expertise on a number of critical central to the execution of the RDP initiative – including Acquisition and Materials Management, and Contracting.
- **RDP National Chief Technical Officer** – Provides overall technical expertise, directional guidance on critical technology elements, and serves as the single coordination point for all emerging agency-wide initiatives – including LAN Management, VISTA Management, HealthVet Integration, RDP consistency with the VA Enterprise Architecture, and congruence with the VA’s Telecom Modernization Program (TMP). Oversees the work of the Regional CTOs and coordinates the activities critical high-level technical subject matter experts.
- **Regional Chief Operations Officer** – Provides direction, oversight, management, and coordination of the RDP planning, analysis, and rollout at the regional level – including the Regional Demonstrations. The Regional COOs report to the National COO, are members of the National RDP Governance Council and have accountability to VISN Directors for all RDP elements.
- **Regional Chief Technology Officer** – Provides overall technical expertise, directional guidance on critical technology elements, and serves as the single coordination point for LAN Management, VISTA Management, HealthVet Integration, RDP consistency with the VA Enterprise Architecture, and congruence with the VA’s Telecom Modernization Program (TMP). Coordinates the activities with all RDP technical subject matter experts.
- **Regional Technical Security Office** – Responsible for oversight and coordination of all security, privacy, and related data management elements associated with the planning, analysis, and rollout of the RDP initiative. Reports to the Regional COO and has accountability to the National OCIS.

PMO Resource Requirements

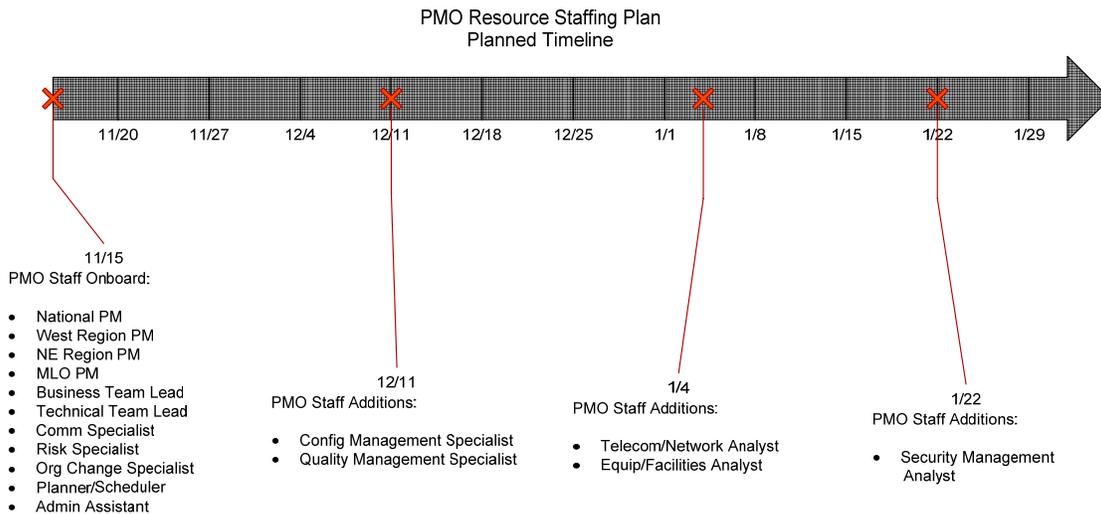
- **Security Management Analyst** – Responsible for analyzing and documenting the impact of critical components related to HIPAA and secure information sharing across federal agencies. Provide critical input and guidance on certification and accreditation, and other key security concerns related to the implementation and roll-out of the RDP infrastructure.

- **Equipment and Facilities Management Analyst** – Responsible for outlining the equipment requirements required to support transition to the RDP environment. Develop a gap analysis at the facility level to identify the current capabilities, RDP future state needs and the transition plan. Outline the equipment needed to support the emerging initiatives which require support from the RDPs (e.g., HealthVet VistA). Performs a Gap Analysis on the current facilities to determine suitability for migration. Determine facility-level security needs. Outlines other key facilities-level issues related to the RDP rollout and develop a facilities rollout plan.
- **Telecom / Network Analyst** – Responsible for analyzing the network and telecom requirements needed to support the RDP environment. Develop a telecom/network capacity plan for the RDP environment. Outline the interfaces and implications related to the Telecom Modernization Program. Outline the telecom/network Service Level Agreements (SLAs) between the Regions and the VISNs for the RDP environment.
- **Regional Project Managers** – Supports the Regional COOs in managing the day-to-day activities associated with the RDP initiative at the Regional level – including the Regional Demonstrations. Coordinates with the National Project Manager to ensure consistency / congruency in the planning, analysis, and execution of critical RDP elements. Identifies and coordinates the resources required to execute the RDP strategy at the regional level. Works closely with the PMO and the other regions to ensure consistency with the top-down RDP approach and to foster knowledge sharing.
- **RDP Project Coordinators (2)** – Responsible for the execution and control of the critical operational and technical elements of the RPCD Initiative. Directs and oversees the day-to-day operations of the RDP analysis and planning including: Security Management, Risk Management, Quality Management, Change Management, Configuration Management, Equipment, Telecom/Network, and Facilities. Responsible for the coordination and delivery of the Governance Plan, Metrics/Reporting, Economic Analysis, Charter, Project Planning, Standards Compliance, and Communication Planning.
- **Communication, Change Control and Configuration Management Analysts** – Responsible for Develop, manage, and execute the communication plan needed to support the RDP initiative. Analyze the impact of changes in the organization structure of the data center environment and to the current VISN organization and identify the potential organizational options, risks, and mitigating strategies. Support the PMO Technical Leads, National COO, and National Project Manager in developing the analyses needed to support the labor relation implications related to the RDP implementation. Develop a rollout strategy for the required organizational and technical changes required, and work with the PMO Technical Leads, Demonstration Leads, and National Level Managers to gain consensus and execute the strategy. Document changes to processes and procedures and identify the impact on workflow at the RDPs. Support the coordination needed to ensure standardization of individual project configurations.
- **Risk and Quality Management Analyst** – Responsible for identifying and analyze the impact of the critical Project Risks associated with the implementation and rollout of the RDP infrastructure – including segmenting qualitative and quantitative risks, assessing the impact of risks, determining the impacts of potential risks. Developing risk mitigation plans.

Review preventative and corrective actions required to mitigate critical risk and security issues. Create an Issue Resolution Processes and Standards. Develop an issue management Database/Log – and management the process throughout the project’s lifecycle. Oversee and coordinate the quality management efforts across all of the components and sub-projects related to the RDP initiative. Develop, coordinate, and validate Quality Management Reports. Ensure alignment of project technology choices with HealthVet VistA, VA Enterprise Architecture, and other emerging initiatives.

- **Project Planner** – Supports the PMO and the Regions in establishing and managing an integrated project plan to manage the RDP initiative. Establishes a TeamPlay plan, tracks and reports Earned Value at the Project and Regional levels, and communicates periodic status to the RDP leadership.
- **RDP Admin Support** – Supports the PMO and the Regions in a number of critical support tasks needed to enable RDP planning, analysis, rollout – including meeting coordination and logistics, note taking and meeting minutes, maintenance of critical deliverables and work papers, and schedule management.

PMO Resource Staffing Plan



Resource Constraints

While Phase I of the RDP Initiative establishes the foundation and supports the rollout, there are critical areas of the project which will be under-supported due to the Phase I focus on creating the foundation for the Initiative. These areas include the following:

- Limited Project Planning Support for the Regional Demonstrations – while some support will be provided, the focus will be on the National Level, with additional support at the Regional Level added in Phase II
- Limited Organizational Change Management Support for the Regional Demonstration – the majority of the Change Management emphasis will be on developing a national change management plan for the initiative, resulting in part-time focus at the Regional Level – as the emphasis shifts to specific regional issues in Phase II additional resources will be required
- Limited Support for the MLO Effort – since the focus of Phase I will be on the National Level and establishment of the Regional Demonstrations, limited resources will be allocated to the MLO – some support will be provided by the PMO to assist with the MLO Infrastructure Assessment
- No dedicated support on Security Management – while the planning and analysis activities occur during Phase I, security elements will be managed by the PMO resources on part time basis (with some consultation with external SMEs), but as the Initiative moves into Phase II, a dedicated resource will be added to fully address the emerging security issues and develop the Security Management Plan

During Phase II there still remain a few areas which will remain under-supported to accomplish the goal of this Initiative.

- Limited tactical and logistical working group support at the Regional Level
- No dedicated support for Facilities/Network Analysis

Staffing Reports

RDP staffing reports will be provided on a weekly, bi-weekly, monthly and quarterly basis. These reports include:

- West and Northeast demonstration internal reports involving technical status, scheduling changes, resource utilization, and implementation progress.
- MLO internal reports with the additional of change control status reports.
- RDP PMO reports that provide a status consolidation on the entire project regarding scheduling, costing, earned value, resource management, risk management, communications management, quality control, and change control.

Staffing Contingency Plans

Certain underlying staffing assumptions are taken into consideration:

- It is assumed that the VA project staff will be assigned to this Initiative on a full time basis.

- It is assumed that the RDP Support Team will have access to the information, personnel, and facilities required to complete the planning, analysis, and rollout support.
- It is assumed that the RDP Support Team will have access to the VA's network and IT infrastructure to perform data collection and analysis to support the RDP Project.

Any changes to these assumptions has the potential to negatively influence the project schedule and the delivery of milestones/deliverables. A possible offset to such a negative schedule impact would be the availability of additional staff resources to augment the PMO. Another alternative, assuming additional staff are not available, would involve the increase in individual resource operating hours.

Training Requirements

Initial, identified training requirements include the need for formal Primavera TeamPlay training. This training is required by the VHA before TeamPlay network access will be granted to members of the PMO team.

Future training requirements may involve software used internally to the PMO (i.e. ClearQuest) or VA/VHA mandated training. Technical/Network training, in support of the RDP, will be dependant upon the support needs of the VHA team within the various VISNS.

11 Quality Management Plan

Purpose

The Veterans Administration Regional Data Processing (RDP) Co-location Quality Management (QM) Plan provides the initiative with a consistent, measurable method to establish and manage project quality that is instrumental to ensure project success. The purpose of a Quality Management Plan is to set forth standards by defining the policies, objectives, and roles and responsibilities for the program. Additionally, the QM Plan provides guidance and processes necessary to implement the standards through planning, quality control, quality assurance, and quality improvement that will be incorporated in order to manage the RDP.

The methodology for the VA RDP Quality Management is derived from and is congruent with the Project Management Book of Knowledge (PMBOK) approach. This integrated view of quality encompasses the goals of the enterprise and all of its products and services. These methods are delineated by:

- Quality Planning—identifying which quality standards are relevant to the project and determining how to satisfy them.
- Quality Assurance—evaluating overall project performance on a regular basis to provide confidence that the project will satisfy the relevant quality standards.
- Quality Control—monitoring specific project results to determine if they comply with relevant quality standards and identifying ways to eliminate causes of unsatisfactory performance.

These methods interact with each other and with the processes in the other knowledge areas as well. Each process may involve effort from one or more individuals or groups of individuals based on the needs of the project. Each process generally occurs at least once in every project phase.

The goal of this Quality Management Plan is to proactively identify and address processes required to ensure that the VARDP initiative will satisfy the needs for which it was undertaken.

Link to Plan

The most recent version of the Quality Management Plan is contained on the National Share Point Site . . .

12 Risk Management Plan

Purpose

The Veterans Administration Regional Data Processing Co-location Risk Management Plan (VARDP RMP) provides the initiative with a consistent method to identify, manage and mitigate risks to ensure success. This synopsis of the Risk Management Plan provides a overview of Risk Management and the purpose of having a plan for the successful implementation of a risk management program.

Risk Management is a process for organized identification, assessment and control of risks. It involves the identification, analysis and evaluation of the risks and the development of cost-effective mitigation for those risks. It drives decisions that affect the development of the business capability and the management of the program. The VA RDP RMP serves as a guide to all VA RDP members on managing program-wide and team level risks. The risk management process will enable the initiative to create strategies to effectively address potential barriers to program success.

Successful management of the VA RDP initiatives requires informed, proactive, and timely management of risks throughout a project's lifecycle. The specific objectives of this program Risk Management Plan and approach are to: Provide a comprehensive method for the VA RDP to plan for and implement risk management procedures; ensure critical risks impacting scope, schedule, budget, business performance, and/or change management are proactively identified, communicated, mitigated, and escalated in a timely manner; facilitate attention to key risks impacting the program and individual teams; produce concise reports which enables program management to focus and coordinate efforts on the critical risks; ensure appropriate stakeholders are informed and, if applicable, participate in the mitigation; provide an audit trail of discussions and mitigation of program risks.

Risk management is carried out at all levels within the program: program, team, and sub team. The risk management process ensures that risks are mitigated at the appropriate level and communicated as appropriate. While this plan provides guidance on managing all levels of risks, the primary focus is on risks at the program level; assuming that similar processes are in effect within the individual teams and sub-teams that comprise the program.

Link to Plan

The complete VA RDP Risk Management Plan can be found in online on the National VA RDP SharePoint Site at:

13 Strategic Communications Plan

Purpose

The purpose of the Communications Plan is to ensure the successful implementation of the RDP initiative by influencing and managing key stakeholders'/customers' perceptions, attitudes, and behaviors. This is accomplished by creating positive, informative, and consistent impressions of the RDP Initiative and ensuring appropriate repetition of the key messages.

The successful implementation of the Communications Plan will yield the following benefits:

- Reduce risks associated with stakeholder/customer behaviors that could thwart initiative
- Gain buy-in and promote acceptance of the new operating model
- Achieve successful results.

The Communications Plan was developed in accordance with the VHA Office of Information (OI) Project Communications Guidebook (Version 1.0 dated November 1, 2002) in the following ways:

- Identification of key internal and external stakeholders
- Design of strategic messages that mitigate potential issues
- Identification of message sources
- Identification of appropriate communication tools/media for conveying strategic messages
- Identification of performance indicators and measures of success
- Development of materials that can be used in communicating with all stakeholders.

In addition to meeting specific OI Project Guidebook criteria, the RDP Communications Plan goes beyond OI Project requirements by achieving the following:

- Messages are developed using a strategic approach found in private-sector media practices
- Communication activities are benchmarked against private sector and government best practices.

Link to Plan

The most recent version of the RDP Communications Plan is contained on the National Share Point Site

<http://vaww.infoshare.va.gov/NationalRDPC/Lists/RDPC%20Outreach%20Calendar%20of%20Events/DispForm.aspx?ID=40&Source=http%3A%2F%2Fvaww%2Einfoshare%2Eva%2Egov%2FNationalRDPC%2FLists%2FRDPC%2520Outreach%2520Calendar%2520of%2520Events%2FAllItems%2Easpx>

14 Cost Management Plan

Tracking the costs, benefits, and cost savings throughout the project will help quantify the actual benefits being achieved and provide feedback to re-plan if benefits are found to fall short. This will be accomplished by developing an initial CBA baseline at the inception of the various components of the project (Regional Demonstrations, MLO, and National CBA Initiative). Once developed, progress at each step of the Initiative will be assessed to validate assumptions in the baseline and determine the impact on the results of the CBA. These impacts and their corresponding results will be proactively communicated to project leadership and key stakeholders to continue to refine projected results for the demonstrations and nationally. This ongoing measurement of interim success provides a level of accountability within the project for the initial projections and establishes a connection between the expected benefits and the work of the project team.

The PMO Team will support VHA and RDP leadership in developing a comprehensive and rational explanation of the project costs and benefits.

- **High Level Analysis to Secure Funding / Mandate** – Development of detailed, top-down analysis of the costs, benefits, and risks associated with Regional Data Center Co-Location implemented through the Minimum Level of Operation (MLO) and Hybrid architectures.
- **Continued Analysis of Western and Northeast Demonstrations** – Refine the high level analysis used to secure funding – including replacing all assumptions with actual data and define the financial performance metrics used to measuring project progress.
- **IDMC and NLB Briefings** – Provide support prior to and during IDMC and NLB briefings including: development of presentation materials and supporting documents, fielding questions, presenting findings.

Project Budget

The tables below represent anticipated spending costs for FY06 and FY07. Please refer to FY06 and FY07 Spend Plans for a more detailed cost breakdown.

Overall RDP 2006 Spending Plan

BOC Description	West Coast	Northeast	MLO	Total \$
Hardware	\$4,625,000	\$7,850,000	\$14,890,865	\$17,100,000
Software	\$100,000	\$600,000	\$1,098,985	\$800,000
Contracts	\$0	\$20,000	\$0	\$20,000
Telecommunications/Plant Aug.	\$200,000	\$0	\$0	\$400,000

Personal Services	\$245,412	\$245,412	\$75,000	\$245,412
Travel	\$100,000	\$200,000	\$150,000	\$100,000
Training	\$0	\$15,000	\$0	\$0
Supplies	\$50,000	\$50,000	\$0	\$150,000
Rent/Collocation/Moves	\$414,000	\$225,000	\$0	\$1,053,000
Totals	\$5,734,412	\$9,205,412	\$16,139,850	\$19,868,412

Table 3: Overall RDP 2006 Spending Plan

Overall RDP 2007 Spending Plan

BOC Description	National Field Operations	Region 1	Region 2	Region 3	Region 4	Total \$
Hardware	\$0	\$2,635,000	\$4,945,433	\$4,945,433	\$3,035,000	\$15,560,865
Software	\$0	\$950,000	\$412,119	\$412,119	\$660,000	\$2,434,239
Contracts	\$4,000,000	\$80,000	\$1,000,000	\$1,000,000	\$4,426,500	\$10,506,500
Telecommunications / Plant Augmentation	\$0	\$1,450,000	\$1,450,000	\$1,450,000	\$2,696,447	\$7,046,447
Personal Services	\$245,412	\$1,000,000	\$300,000	\$300,000	\$275,000	\$2,120,412
Travel	\$80,000	\$100,000	\$180,000	\$180,000	\$140,000	\$680,000
Training	\$4,000	\$20,000	\$20,000	\$20,000	\$120,000	\$184,000
Supplies	\$0	\$50,000	\$50,000	\$50,000	\$200,000	\$350,000
Rent/Collocation/Moves	\$0	\$1,067,512	\$487,000	\$487,000	\$540,000	\$2,581,512
Totals	\$4,329,412	\$7,352,512	\$8,844,552	\$8,844,552	\$12,092,947	\$41,463,974

Project Financial Cost Management

The VA has moved to standardize project management practices by instituting industry standards in project management disciplines. One standard that has been adopted is the use of an Enterprise Project Management (EPM) software tool, Primavera IT Project Office Suite.

Primavera provides overall visibility into priorities, progress, and staffing. This allows VA to make informed decisions and provides the capability to deliver projects on time through the capture and re-use of best practices. Primavera will integrate project management capabilities into a unified information system for all project stakeholders. Primavera will also unite project, resource and process management, and give project managers and senior management clear visibility and insight into all VA projects. Primavera provides for project management, automated cost estimating, “what-if” scenario capabilities, resource management, project tracking, collaboration, web site publication, risk management, document control, and earned value calculations.

Schedule Uses and Reporting

One of the fundamental reasons for reporting is to assess and communicate project health by identifying variances in cost, schedule and estimated completion. Significant variances will trigger analysis, determination of corrective actions and re-planning, if necessary, at various levels of the project structure.

TeamPlay has a series of report templates. The reports are accessed by selecting “Reports” from the left side of the screen or by selecting Tools/Reports from the menu bar. The user may then navigate to the appropriate report groupings to find the desired report. When identified, the user selects “Run Report” from the Command bar on the right side of the screen.

It is important to pay attention to the report groups. Many if not most of the “global” reports run against individual projects. The report should be copied and pasted in the default group and then sorted to the project for which it will be run.

Project Baseline

The baseline represents a ‘snapshot’ of the project plan at a particular point in time and serves as a tool for performance evaluation. All projects, once scheduled and analyzed for cost, time and resources, must be baselined. A baseline must be created at the completion of the initial planning phase of the project lifecycle so that it may be used for comparison as the project progresses. The baseline must be indicated for use for summarization of the project. The baseline should be regularly compared to the current schedule/baseline to evaluate progress and identify variances. The baseline is used to indicate if the project is progressing at an acceptable pace. The baseline used for summarization drives the project’s Primavera reported budget, timeline, and viability.

OMB Exhibit 300 projects must ensure the baseline is consistent with the OMB approved baseline that is reported on the Exhibit 300. The authority to approve and record changes to the project and functional baselines is vested in the Oversight Authority. A new baseline can be created only after the Oversight Authority approves a baseline change request with concurrence of senior management in the Administration or Staff Office. The original baseline is always preserved in the tool. In addition, projects that are reported to the Enterprise Information Board (EIB) and/or are at the level of the Exhibit 300 must gain approval from the EIB before changes are implemented.

Times for establishing a baseline:

- At the conclusion of initial planning
- At the conclusion of each phase of the project
- In the event of scope change

Cost Reports

One of the fundamental reasons for reporting is to assess and communicate project health by identifying variances in cost, schedule and estimated completion. Significant variances will trigger analysis, determination of corrective actions and re-planning, if necessary, at various levels of the project structure.

Project Earned Value Report

Project ID	Project Name	BCWS	BCWP	ACWP	BAC	ETC	EAC	VAC
Bids	Bid Projects	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OzBuild	ozbuild Bid Projects	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OZB	RFP1810004	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Opportunities	Contract Opportunities	\$58,000.00	\$2,000.00	\$3,400.00	\$631,310.00	\$658,910.00	\$662,310.00	(\$31,000.00)
AAIP-2	AAIP Master092504.mpp	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Opp1	Possible Opportunity	\$12,000.00	\$0.00	\$0.00	\$12,000.00	\$12,000.00	\$12,000.00	\$0.00
HRSYS	HR System Upgrade	\$10,000.00	\$2,000.00	\$3,400.00	\$13,200.00	\$40,800.00	\$44,200.00	(\$31,000.00)
NEWEPS	(New EPS)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Test	Test	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NEWPROJ	(New Projed)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NEWPROJ-1	(New Projed)-1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NEWPROJ-2	(New Projed)-2	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NEWEPS-1	(New EPS)-1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Table 3: Project Earned Value Report

The Project Earned Value Report provides an enterprise summary of selected earned value data elements for each project in the enterprise. It is listed in the “Cost and Schedule” report group within the “All Projects/ Portfolio Analyst” report group. Data from this report may be used to manually calculate SPI and CPI for an independent validation outside the tool. The lowest level in the EPS is the project.

WBS Earned Value Definition List Report

WBS Code	WBS Name	EV % Complete Technique	EV % Complete Factor	EV ETC Technique	EV Perf
CMS EHR	CMS Project	Activity % Complete		Remaining Total Cost	
CS	Common Services	Activity % Complete	6	Remaining Total Cost	0.88
0045A-CS	Common Services Program Activities	Activity % Complete	6	Remaining Total Cost	0.88
0045A-PSIM	Person Service Identity Management	Activity % Complete	6	Remaining Total Cost	0.88
0045A-NPI	National Provider Index	Activity % Complete	6	Remaining Total Cost	0.88
0045A-CAIP	CAIP - Cross-Application Integration Protocol Project Plan	Activity % Complete	6	Remaining Total Cost	0.88
0045A-PS-D	Person Service - Person Demographics	Activity % Complete	6	Remaining Total Cost	0.88
0045A-PS-PL	Person Service - Person Lookup	Activity % Complete	6	Remaining Total Cost	0.88
0045A-SDS	SDS - Standard Data Services - formerly Reference Table Management Services (RTMS)	50/50 % Complete	6	(BAC - BCWP) / (CPI * SPI)	0.88
0045 - Person	Person Services for Health/Vet	Activity % Complete	6	Remaining Total Cost	0.88

Table 7: WBS Earned Value Definition List

The WBS Earned Value Definition List report provides insight into how earned value management is calculated at the WBS level for all projects in the enterprise. It is listed in the “Project/WBS Details” report group within the “All Projects/ Portfolio Analyst” report group. This can be useful to Project Managers for quality reviews of settings.

Activity Earned Value Report

WBS		Activity Name	Activity	BCWS	BCWP	ACWP
HRSYS	HR System Upgrade					
HRSYS.1	System Development					
HRSYS.1.1	System Requirements					
HR1000		Start Development Milestone	Not Started	\$0.00	\$0.00	\$0.00
HR1010		Define operational concept of new system	Not Started	\$0.00	\$0.00	\$0.00
HR1020		Perform system requirements analysis	In Progress	\$2,000.00	\$0.00	\$400.00
Subtotal				\$2,000.00	\$0.00	\$400.00
HRSYS.1.2	System Design					
HR1030		Bid Solicited	Completed	\$0.00	\$0.00	\$0.00
HR1031		Contract Awarded	Completed	\$0.00	\$0.00	\$0.00
HR1032		Write Code	In Progress	\$8,000.00	\$2,000.00	\$3,000.00
HR1033		Code Written	Not Started	\$0.00	\$0.00	\$0.00
Subtotal				\$8,000.00	\$2,000.00	\$3,000.00
Subtotal				\$10,000.00	\$2,000.00	\$3,400.00
Subtotal				\$10,000.00	\$2,000.00	\$3,400.00

Table 4: Activity Earned Value Report

The Activity Earned Value report displays information for open projects only at the WBS/Activity level. Data includes planned value (BCWS), earned value (BCWP) and actual cost (ACWP) cost information. The “Activity Earned Value” report is listed in the “Cost” report group within the “Open Projects” report group.

Earned Value Report For OMB Exhibit 300

Activity Name	OMB Start Date	OMB End Date	OMB Duration	OMB Planned Cost	Actual Start	Actual Finish	Actual % Complete	Actual Total Cost
1.1 50 Project Management Certified Employees	12-Oct-04	18-Apr-05	129.0d	\$51,440.00	12-Oct-04		0%	\$224.00
1.2 PM Conference Conducted	23-Aug-04	23-Jun-05	210.0d	\$434,329.94	23-Aug-04		0.38%	\$343.00
1.3 PM Contract Vehicles Administered			0.0d	\$0.00			0%	\$0.00
2.1 PRM and PM processes and procedures continuously improved			0.0d	\$0.00			0%	\$0.00
2.2 One Select Phase review and three Control Phase reviews covering all Exhibit 300s conducted	17-Feb-04	03-Apr-06	535.0d	\$0.00			0%	\$0.00
2.3 5-year IT Strategic Plan revised and the IT policy librarian function performed	17-Feb-04	01-May-06	555.0d	\$0.00			0%	\$0.00
2.4 10 independent program management and post implementation reviews conducted			0.0d	\$0.00			0%	\$0.00
3.1 TeamPlay in-use on 98% of Exhibit 300s (excluding Steady State 300s)	12-Oct-04	19-Sep-05	235.5d	\$1,341,581.83	12-Oct-04		0.34%	\$2,312.00

Table 5: Earned Value Report for OMB Exhibit 300

This report will be used by OMB Exhibit 300 Project Managers annually to complete the Table in Section I.H.4 A. This report is based on the activity grouped by the EMPO activity code. The

total values generated by this report may be validated using the Global Layout entitled OMB 300 I.H.4 Table (Project).

Cost Approval Process

The RDP project will be submitting OMB300 budget documents each fiscal year, starting with the FY07 submission. The project will conform to the well established and well documented OMB300 budget submission and approval guidelines. For details on the overall cost approval process please review existing OMB300 documentation that can be found on the OMB website: <http://www.whitehouse.gov/omb/>

15 Procurement Management Plan

Procurement Management Plan Purpose

The procurement plan for the Data Center is reflected in the Architecture Network and Design Deliverable which at a high level highlights the additional hardware and software that will be required to support Data Center operations, as well as what will be required at each of the sites. The Bill of Materials also prepared at the regional level provides the details on equipment purchases. Procurement efforts will occur over the life of the project as new sites are added on to the Data Center. For example, new shadow servers will be procured when it is identified that existing equipment is not available to serve this purpose. VA will continue to leverage their existing contract vehicles for procurement of equipment where it falls within the scope of that contract. This will include procurement for both the Data Centers and the individual sites. The timing for procurement for circuits, routers, LAN upgrades, etc. for each site will continue to be determined by the site, in coordination with the RDPC, with consideration for when the site will be migrating to the Data Center.

Required Project Procurements

Planned procurement efforts allow for maximizing buying power on commodity technologies and services. The RDPC model will enable VA to pool their purchasing power to drive down technology product and services costs. This model creates an effective procurement channel to the VISNs and sites. The following benefits may be recognized through planned procurement under the RDPC model:

- Enhanced terms and conditions for contracts
- Improved time to receive hardware, software and services
- Actual monetary savings
- Higher level of expertise

Description of Items to be Acquired

The items to be acquired at the site and at the Data Center level are identified through the Bill of Materials document. This document also provides for any turn-in items. The government cost estimate provides the detailed cost estimates for items to be acquired by the RDPC.

VA IT Acquisition Process

The diagram below depicts the general VA Acquisition process. Details about each document prepared can be found on the RDPC Sharepoint site. The procurement process

follows a rigid solicitation preparation process that includes several pre-requisite documents that are entered into the VA ITAS system. These documents include:

- Requirements Analysis
- Nine Questions on Reasons (why this is being purchased, contract vehicle, and business justification for why this can't be accomplished from within the agency)
- Statement of Objectives
- Acceptance Test Plan
- Business Justification
- Cost Benefit Analysis
- Evaluation Factors
- Statement of Work
- Bill of Materials
- Government Cost Estimate

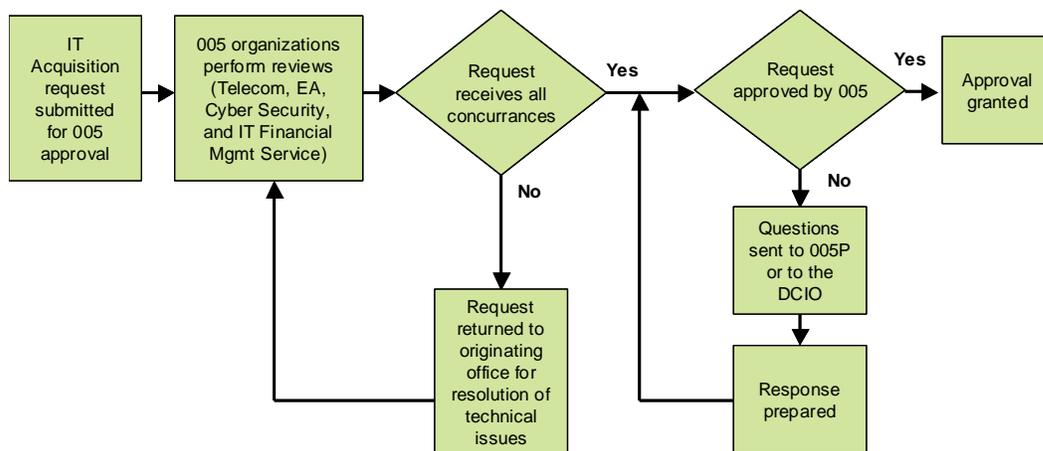


Figure 27: VA IT Acquisition Approval Process

Solicitation Planning

The project management office has provided past support to the sites and the RDPC in helping to develop the pre-requisite documents as identified under the VA Acquisition IT Process.

Period of Performance

The period of performance for procurement efforts under the RDPC will depend on the contract vehicle and size of the procurement. For example, the recent upgrade for the Pittsburgh Healthcare System LAN will be for a 5 year base period.

Applicable Conditions

Acquisition of hardware and software related to the RDPC LAN/WAN environment should incorporate the LAN standards that are being defined by the RDPC Standards

Workgroup. Any proposed LAN/WAN new procurement or upgrades at the data center or site level should be documented and should include detailed design diagrams that depict the current and future proposed LAN configurations. A contingency plan should also be established for any minor system design changes that might be necessary during the design phase. The design must meet VHA reliability, redundancy, and security requirements stipulated at the start of the project.

Acquisition of RDPC hardware and software must be compatible with the current network and routing architectures and meet the cost, schedule and performance requirements as defined by RDPC leadership.

Contract Administration

Contract Administration will continue to be executed by the Contracting Officers at each of the sites for site procurements. The acquisition process for the demonstration projects is currently leveraging existing VISN contracting staff for the procurement efforts, as well as the RDPC Project Management Office.

The Contracting Officer is responsible for overseeing the procurement process, including ensuring that all pre-requisite documentation is prepared, standard contracting language is applied, and all legal reviews are adhered to, as well as review of all documentation. The Contracting Officer will decide on contract vehicles available for the procurement efforts at the site level, which includes contract type and period of performance.

Contract Closeout

For RDPC related procurement efforts, an Evaluation Team will be assembled that will include staff from the RDPC, VISN and site to assess proposals and make a determination as to the best value for the government which also adheres to the other evaluation criteria previously defined. Typical evaluation criteria for RDPC related procurement efforts will include technical approach, past experience, ability to integrate with existing standards and infrastructure, and cost.

Appendices

Appendix A – Points of Contact

Government Points of Contact:			
Position	Name/(department/division/agency)	Phone	E-mail
RDP PMO Lead	Howard Green	301-427-2117	Howard.GreenB@med.va.gov
VHA COTR	Susan Gerbing	301-427-2228	Susan.Gerbing2@med.va.gov
Contractor Information:			
Program Manager	David Cradlin	301-427-2234	David.Cradlin@med.va.gov
National Project Manager	Horace Blackman	301-427-2237	Horace.Blackman@med.va.gov
West Region Proj Manager	Andy Mattocks	301-427-2178	Andrew.Mattocks@med.va.gov
NE Region Proj Manager	Helayne Sweet	703-582-1346	Helayne.Sweet@med.va.gov
MLO Project Manager	Sabrina Poole	301-427-2185	Sabrina.Poole@med.va.gov

Appendix B – Key Terms and Acronyms

Activity – An element of work performed during the course of a project. An activity normally has an expected duration, cost, and resource requirements and results in a deliverable or handoff to another activity. In this way, the activity is tied back to the *Work Breakdown Structure*. Activities are often subdivided into tasks.

Activity Based Budget – A budgeting concept based on the goods and services produced by an organization for its customers rather than the traditional cost based budget based on requests from cost centers. Activities are processes that consume resources, such as time and money, to produce a given output.

Actual Cost (AC) – Total costs incurred that must relate to whatever cost was budgeted within the planned value and earned value (which can sometimes be direct labor hours alone, direct costs alone, or all costs including indirect costs) in accomplishing work during a given time period. See also *earned value*.

Actual Cost of Work Performed (ACWP) – This term has been replaced with the term actual cost.

Administrative Closure – Generating, gathering, and disseminating information to formalize phase or project completion.

Assumptions – Assumptions are factors that, for planning purposes, are considered to be true, real, or certain. Assumptions affect all aspects of project planning, and are part of the progressive elaboration of the project. Project teams frequently identify, document, and validate assumptions as part of their planning process. Assumptions generally involve a degree of risk.

Baseline – The original approved plan (for a project, a work package, or an activity), plus or minus approved scope changes. Usually used with a modifier (e.g., cost baseline, schedule baseline, performance measurement baseline). Also called *Baseline Plan*.

Budget At Completion (BAC) – The sum of the total budgets for a project.

Budgeted Cost of Work Performed (BCWP) – This term has been replaced with the term *earned value*.

Budgeted Cost of Work Scheduled (BCWS) – This term has been replaced with the term *planned value*.

Business Case – Structured proposal for business improvement that functions as a decision package for organizational decision-makers. It may contain the goals of the project and how those goals support the goals of the enterprise. Other sections may include a cost/benefit analysis, a requirement analysis, and a make or buy analysis. A business case usually includes a comprehensive fiscal analysis and estimate.

Business Requirements – 1) Requirements state the customer needs the project output will satisfy. Requirements typically start with phrase “The system shall” Business requirements refer to how the project will satisfy the business mission of the customer. 2) Business requirements refer to business functions of the project, such as project management, financial management, or change management.

Business Reference Model (BRM) – A function-driven framework that describes the Lines of Business and Internal Functions performed by the Federal government independent of the agencies that perform them. Major IT investments are mapped to the BRM to identify collaboration opportunities.

Buy-In – usually refers to securing a personal or organizational agreement with project goals or management methods. Buy-in from senior management or functional organizations may be necessary to accomplish many aspects of an enterprise project.

Capital Assets – land, structures, equipment, intellectual property (e.g., software), and information technology (including IT service contracts) that are used by the Federal government and have an estimated useful life of two years or more. See Appendix One of the Capital Programming Guide for a more complete definition of capital assets. Capital assets do not include items acquired for resale in the ordinary course of operations or items that are acquired for physical consumption, such as operating materials and supplies.

Capital Planning And Investment Control (CPIC) – The same as capital programming and is a decision-making process for ensuring that information technology (IT) investments integrate strategic planning, budgeting, procurement, and the management of IT in support of agency missions and business needs. The term comes from the Clinger-Cohen Act of 1996 and generally is used in relationship to IT management issues.

Capital Programming – An integrated process within an agency for planning, budgeting, procurement and management of the agency’s portfolio of capital assets to achieve agency strategic goals and objectives with the lowest life-cycle cost and least risk.

Capital Project (Investment) – The acquisition of a capital asset and the management of that asset through its life-cycle after the initial acquisition. Capital projects (investments) may consist of several useful segments.

Change Control – The processes, procedures and responsibilities for identifying, evaluating and managing change. Integration is achieved by assessing a potential change’s impact to all relevant aspects of a project, primarily scope, cost, schedule, risk and quality. Change control involves implementing a process change requests and the systematic tracking of change assessment and implementation.

Change Management – 1) The process of implementing change control. 2) The active involvement of project management in monitoring and controlling the change control process.

Change Control Management Plan – See Integrated Change Control Management Plan

Closeout – The last phase of a project. Closeout involves closing contracts, archiving records, completing project administrative tasks, and conducting final project reviews.

Communications Management – see *Project Communications*

Communications Management Plan – The Communications Management Plan describes how the various types of project information are distributed, reviewed, updated and filed.

Concept Definition – A phase of a project where the initial business case (based on a business need) is tested and the viability of the proposed solution and approach is explored. During the Concept Definition phase the project is “initiated” or “chartered” and the Project Sponsor, Business Sponsor, and/or Project Manager is given authority to proceed with the project.

Configuration Management (CM) – Any documented procedure used to apply technical and administrative direction and surveillance to: identify and document the functional and physical characteristics of an item or system, control any changes to those characteristics, record and report the change and its implementation status and audit the items and system to verify their conformance to requirements.

Constraint – Applicable restriction that will affect the performance of the project. Any factor that affects when an activity can be scheduled.

Contingencies – See reserve and contingency planning.

Contingency Planning – The development of a management plan that identifies alternative strategies to be used to ensure project success if specified risk events occur.

Contingency Reserve – The amount of money or time needed above the estimate to reduce the risk of overruns of project objectives to a level acceptable to the organization.

Contract – A mutually binding agreement that obligates the seller to provide the specified product and obligates the buyer to pay for it.

Contract Administration – Managing the relationship with the seller.

Contract Closeout – Completion and settlement of the contract, including resolution of any open items.

Control – The process of comparing actual performance with planned performance, analyzing variances, evaluating possible alternatives, and taking appropriate corrective action as needed.

Control Charts – A graphic display of the results, over time and against established control limits, of a process. They are used to determine if the process is “in control” or in need of adjustment.

Corrective Action – Changes made to bring expected future performance of the project into line with the plan.

Cost Baseline – The process of freezing cost estimates and budget. When a baseline is established, the change control process is implemented and performance is measured against the baselined cost data.

Cost Budgeting – Allocating the overall cost estimates to individual project activities.

Cost Control – Controlling changes to the project budget.

Cost Estimating – Developing an approximation (estimate) of the cost of the resources needed to complete project activities.

Cost Management – The process of monitoring project cost data to determine performance and variance from the planned cost targets/estimates.

Cost Management Plan – The cost management plan describes the process for implementing change control over cost estimates and the project time-phased cost baseline. The plan includes the steps taken when the performance measurement system identifies major or minor cost variances.

Cost of Quality – The costs incurred to ensure quality. The cost of quality includes quality planning, quality control, quality assurance, and rework.

Cost Performance Index (CPI) – The cost efficiency ratio of earned value to actual costs ($CPI = EV/AC$). CPI is often used to predict the magnitude of a possible cost overrun using the following formula: $BAC/CPI = \text{projected cost at completion}$.

Cost Variance (CV) – (1) Any difference between the budgeted cost of an activity and the actual cost of that activity. (2) In earned value, ($CV = EV - AC$).

Crashing – Taking action to decrease the total project duration after analyzing a number of alternatives to determine how to get the maximum duration compression for the least cost.

Critical Activity – Any activity on a critical path. Most commonly determined by using the *critical path method*. Although some activities are “critical,” in the dictionary sense, without being on the *critical path*, this meaning is seldom used in the project context.

Critical Path – The series of activities that determines the duration of the project. In a deterministic model, the critical path is usually defined as those activities with *float* less than or equal to a specified value, often zero. It is the longest path through the project. See *critical path method*.

Critical Path Method (CPM) – A network analysis technique used to predict project duration by analyzing which sequence of activities (which path) has the least amount of scheduling flexibility (the least amount of *float*). Early dates are calculated by means of a *forward pass* using a specified start date. Late dates are calculated by means of a *backward pass* starting from a specified completion date (usually the forward pass’ calculated project *early finish date*).

Critical Success Factors – Defines how progress and outcomes will be measured on a project—sometimes called objectives. Some typical critical success factors include functionality, quality, time, and cost.

Current Finish Date – The current estimate of the point in time when an activity will be completed.

Current Start Date – The current estimate of the point in time when an activity will begin.

Customer – Generally the organization that receives and becomes the final owner of the output of the project. The customer can be both internal or external to the organization developing the project output.

Customer Approval – The formal process of receiving written acceptance of the project output.

Customer Requirements – Requirements enumerate and state the customer needs the project output will satisfy. Requirements typically start with phrase “The system shall ….”

Data Date (DD) – The date at which, or up to which, the project’s reporting system has provided actual status and accomplishments. Also called *as-of date*.

Deliverable – Any measurable, tangible, verifiable outcome, result, or item that must be produced to complete a project or part of a project. Often used more narrowly in reference to an external deliverable, which is a deliverable that is subject to approval by the project sponsor or customer.

Dependency – Logical relationship between and among tasks of a project’s WBS, which can be graphically depicted on a network. May also refer to dependencies among projects.

Deployment Process – see also *System Deployment*

Duration (DU) – The number of work periods (not including holidays or other non-working periods) required to complete an activity or other project element. Usually expressed as workdays or workweeks. Sometimes incorrectly equated with elapsed time. See also *effort*.

Duration Compression – Shortening the project schedule without reducing the project scope. Duration compression is not always possible and often requires an increase in project cost.

E-business (Electronic Business) – Doing business online. E-business is often used as an umbrella term for having an interactive presence on the Web. A government e-business initiative or investment includes web-services type technologies, component based architectures, and open systems architectures designed around the needs of the customer (citizens, business, governments, and internal Federal operations).

E-government (E-Gov) – The use by the government of web-based Internet applications and other information technologies, combined with processes that implement these technologies.

Early Finish Date (EF) – In the *critical path method*, the earliest possible point in time on which the uncompleted portions of an *activity* (or the project) can finish based on the *network logic* and

any schedule *constraints*. Early finish dates can change as the project progresses and changes are made to the project plan.

Earned Value (EV) – The physical work accomplished plus the authorized budget for this work. The sum of the approved cost estimates (may include overhead allocation) for activities (or portions of activities) completed during a given period of (usually project-to-date). Previously called the budgeted cost of work performed (BCWP) for an activity or group of activities.

Earned Value Management (EVM) – A method for integrating scope, schedule, and resources, and for measuring project performance. It compares the amount of work that was planned with what was actually earned with what was actually spent to determine if cost and schedule performance are as planned.

Effort – The number of labor units required to complete an activity or other project element. Usually expressed as staff hours, staff days or staff weeks. Should not be confused with duration.

Element – One of the parts, substances, or principles that make up a compound or complex whole.

Enterprise Information Board (EIB) – Chaired by the Assistant Secretary for Information and Technology (VA Chief Information Officer) and includes representatives from VA's business and technical communities. Provides a corporate forum for Department IT project and program management. Oversees the process of reviewing IT investment proposals for compliance with the VA enterprise architecture. Ensures that the IT planning process addresses sociological change management, cyber and information security, project management, and capital investment as well as VA enterprise architecture concerns.

Enterprise Project Management Council (EPMC) – Reports to the Assistant Secretary for Information and Technology. Responsible for defining Department-wide processes and procedures for managing projects.

Estimate – An assessment of the likely quantitative result. Usually applied to project costs and durations and should always include some indication of accuracy (e.g., +/- x percent). Usually used with a modifier (e.g., preliminary, conceptual, feasibility). Some application areas have specific modifiers that imply particular accuracy ranges (e.g., order-of-magnitude estimate, budget estimate, and definitive estimate in engineering and construction projects).

Estimate At Completion (EAC) – The expected total cost of an activity, a group of activities, or of the project when the defined scope of work has been completed. Most techniques for forecasting EAC include some adjustment of the original cost estimate, based on project performance to date.

Federal Enterprise Architecture (FEA) – A framework that describes the relationship between business functions and the technologies and information that support them. Major IT investments will be aligned against each reference model within the FEA framework.

Federal Information Security Management Act (FISMA) – Requires agencies to integrate IT security into their capital planning and enterprise architecture processes, to conduct annual IT security reviews of all programs and systems, and to report the results of those reviews to OMB.

Final Performance Report – Developed during the closeout phase of the project to capture the final variance from baselined scope, cost and schedule.

Finish Date – A point in time associated with an activity’s completion. Usually qualified by one of the following: actual, planned, estimated, scheduled, early, late, baseline, target, or current.

Float – The amount of time that an activity may be delayed from its *early start* without delaying the project finish date. *Float* is a mathematical calculation, and can change as the project progresses and changes are made to the Project Plan. Also called *slack*, *total float*, and *path float*.

Full Acquisition – the procurement and implementation of a capital project (investment) or useful segment/module of a capital project (investment). Full acquisition occurs after all planning activities are complete and the EIB and SMC selects and approves the proposed technical approach and project (investment) plan, and establishes the baseline cost, schedule and performance goals for this phase of the investment.

Full Funding – appropriations—regular annual appropriations or advance appropriations—are enacted that are sufficient in total to complete a useful segment of a capital project (investment) before any obligations may be incurred for that segment. When capital projects (investments) or useful segments are incrementally funded, without certainty if or when future funding will be available, it can result in poor planning, acquisition of assets not fully justified, higher acquisition costs, project (investment) delays, cancellation of major projects (investments), the loss of sunk costs, or inadequate funding to maintain and operate the assets. Budget requests for full acquisition of capital assets must propose full funding.

Functional Manager – A manager responsible for activities in a specialized department or function (e.g., engineering, manufacturing, marketing).

Human Resource Management – The processes employed to organize the efforts personnel assigned to the project. Human Resource Management include organizational planning, staff acquisition, and team development.

Impact Assessment – The process of evaluating project risks and performance variances to determine the effect on project disciplines such as scope, cost and schedule.

Impact Probability Chart – Rates risks on the cost effect a risk occurrence will generate on the project budget. Can be stated as a percentage or also as a statement like: very high (above 81%), high (60% to 80%), probable (40% to 79%), low (20% to 39%), and very low (below 19%).

Information Collection and Distribution – Making needed information available to project shareholders.

Information Technology – As defined by the Clinger-Cohen Act of 1996, sections 5002, 5141, and 5142, means any equipment or interconnected system or subsystem of equipment that is used in the automatic acquisition, storage, manipulation, management, movement, control, display, switching, interchange, transmission, or reception of data or information. For purposes of this definition, equipment is “used” by an agency whether the agency uses the equipment directly or it is used by a contractor under a contract with the agency that (1) requires the use of such equipment or (2) requires the use, to a significant extent, of such equipment in the performance of a service or the furnishing of a product. Information technology includes computers, ancillary

equipment, software, firmware and similar procedures, services (including support services), and related resources. It does not include any equipment that is acquired by a Federal contractor incidental to a Federal contract.

Initiation – Approving the Project Sponsor, Business Sponsor, and/or Project Manager to begin the next phase in the project life cycle.

Integrated Change Control – Coordinating changes across the entire project.

Integrated Change Control Management Plan –Establishes the processes, procedures and responsibilities for identifying, evaluating and managing change. Integration is achieved by assessing a potential change’s impact to all relevant aspects of a project, primarily scope, cost, schedule, risk and quality.

Integrated Project Team (IPT) – A multi-disciplinary team lead by a project manager responsible and accountable for planning, budgeting, procurement and life-cycle management of the investment to achieve its cost, schedule and performance goals. Team skills include: budgetary, financial, capital planning, procurement, user, program, value management, earned value management, and other staff as appropriate.

Lessons Learned – The documented learning gained from the process of performing the project. Lessons learned may be identified at any point. Also considered a project record.

Life Cycle- The entire useful life of a product or service, usually divided into sequential phases which include initiation, development, execution, operation, maintenance, and disposal or termination.

Life-Cycle Costs – The overall estimated cost, including both government and contractor labor costs, for a particular program alternative over the time period corresponding to the life of the program, including direct and indirect initial investment (non-recurring) costs plus any periodic or continuing (recurring) costs of operation and maintenance.

Life Cycle Costing – The concept of including acquisition, operating, and disposal costs when evaluating various alternatives.

Life-Cycle Costs – The overall estimated cost, both government and contractor, for a particular program alternative over the time period corresponding to the life of the program, including direct and indirect initial costs plus any periodic or continuing costs of operation and maintenance.

Major Acquisition – A capital project (investment) that requires special management attention because of its: (1) importance to an agency’s mission; (2) high development, operating, or maintenance costs; (3) high risk; (4) high return; or (5) significant role in the administration of an agency’s programs, finances, property, or other resources.

Major IT Investment – A system or investment that requires special management attention because of its importance to an agency’s mission;

- investment was a major investment in the FY 2004 submission and is continuing;
- investment is for financial management and spends more than \$500,000;
- investment is directly tied to the top two layers of the Federal Enterprise Architecture (Services to Citizens and Mode of Delivery);

- investment is an integral part of the agency’s modernization blueprint (EA);
- investment has significant program or policy implications;
- investment has high executive visibility; investment is defined as major by the SMC
- OMB may work with the agency to declare other investments as major investments
- All major investments must submit a “Capital Asset Plan and Business Case,” exhibit 300. Investments that are e-government in nature or use e-business technologies must be identified as major investments regardless of the costs. If you are unsure about what investments to consider as “major,” consult the IT Capital Planning Service.

Management Plan – see also *Project Management Plan*

Master Schedule – A summary-level schedule that identifies the major activities and key milestones.

Milestone – A significant event in the project, usually completion of a major *deliverable*.

Milestone Reviews – Decision points in VA’s Program/Investment Management Life Cycle where the project/system is presented to the EIB and approved (or disapproved) to move forward to the next step in the process.

Mitigation – See *risk mitigation*.

Monitoring – The capture, analysis, and reporting of project performance, usually as compared to plan.

Network Analysis – The process of identifying early and late start and finish dates for the uncompleted portions of project activities. See also critical path method, program evaluation and review technique, and graphical evaluation and review technique.

Office of Policies, Plans, and Programs – Provides technical direction and guidance to ensure that information technology (IT) is acquired and IT resources are managed for the Department in a manner that implements the policies and procedures of the Clinger-Cohen Act and the priorities established by the Secretary and Chief Information Officer.

OMB Exhibit 300 (Capital Asset Plan and Business Case) – OMB Circular A-11 Part 7 describes the OMB Exhibit 300 as a format to demonstrate to agency management and OMB that it has employed the disciplines of good project management, represented a strong business case for the investment, and met other Administration priorities to define the proposed cost, schedule, and performance goals for the investment if funding approval is to be obtained.

Operational (steady state) – An asset or part of an asset that has been delivered and is performing the mission.

Organizational Breakdown Structure (OBS) – A depiction of the project organization arranged so as to relate *work packages* to organizational units.

Organizational Planning – Identifying, documenting, and assigning project roles, responsibilities, and reporting relationships.

Performance Criteria – Various standards used to evaluate variances from the scope, schedule, and cost baselines. Examples could include schedule activities that are one week late, cost increases that exceed ten percent of budget, or the addition of a work breakdown structure work package

Performance Reporting – Collecting and disseminating performance information. This includes status reporting, progress measurement, and forecasting.

PERT Chart – The term is commonly used to refer to a project network diagram. See *program evaluation and review technique* for the traditional definition of PERT.

Planned Value (PV) – the cumulative budgeted value of the project for work *scheduled* to date. PV is calculated by applying the scheduled percentage of completion against the cost budget.

Planning – preparing, developing or acquiring the information you will use to: design the investment; assess the benefits, risks, and risk-adjusted life-cycle costs of alternative solutions; and establish realistic cost, schedule, and performance goals, for the selected alternative, before either proceeding to full acquisition of the capital project (investment) or useful segment or terminating the investment. Planning must progress to the point where you are ready to commit to achieving specific goals for the completion of the acquisition before preceding to the acquisition phase. Information gathering activities may include market research of available solutions, architectural drawings, geological studies, engineering and design studies, and prototypes. Planning is a useful segment of a capital project (investment). Depending on the nature of the investment, one or more planning segments may be necessary.

PMBOK – The Project Management Institute’s Guide to the Project Management Body of Knowledge. This document represents project management best practices.

PMBOK Map/Mapping – Coordinating organizational project management functions to the functional processes and knowledge area activities described in the PMBOK.

Policy and Governance – Formal written standards that control the operational functions of a major enterprise organization.

Post-Implementation Report – Documents project status and performance as a result of the Post-Implementation Review.

Post-Implementation Review – The last of the VA IT milestone reviews. Conducted at a time when an assessment of the operation of the project output is practical. Determines open project activities and insures major project requirements are satisfied.

Privacy Impact Assessment – A process for examining the risks and ramifications of collecting, maintaining and disseminating information in identifiable form in an electronic information system, and for identifying and evaluating protections and alternative processes to mitigate the impact to privacy of collecting information in identifiable form. Consistent with forthcoming OMB guidance implementing the privacy provisions of the E-government Act, agencies must conduct privacy impact assessments for all new or significantly altered information technology investments administering information in identifiable form collected from or about members of the public. Agencies may choose whether to conduct privacy impact assessments for information

technology investments administering information in identifiable form collected from or about agency employees.

Procurement Management – see *Project Procurement Management*

Procurement Management Plan – Describes the project procurement processes such as: solicitation planning, solicitation, source selection, and contract administration. Includes the tools and techniques and outputs from each procurement process.

Program – A group of related projects managed in a coordinated way. Programs usually include an element of ongoing work.

Program Evaluation and Review Technique (PERT) – An event-oriented network analysis technique used to estimate project duration when there is uncertainty in the individual activity duration estimates. PERT applies the critical path method using durations that are computed by a weighted average of optimistic, pessimistic, and most likely duration estimates. PERT computes the standard deviation of the completion date from those of the path's activity durations.

Project – A temporary endeavor undertaken to create a unique product, service or result.

Project Assumptions – see *Assumptions*

Project Authority – Generally a senior organizational executive that approves project mission and cost planning. In some cases the project authority and project sponsor may be the same executive.

Project Budget – The estimated costs, over time, for each project Work Breakdown Structure element.

Project Charter – A document issued by senior management that formally authorizes the existence of a project. It provides the *Project Manager* with the authority to apply organizational resources to project activities.

Project Closeout – see *Closeout*

Project Constraints – see *Constraints*

Project Control – The act of monitoring and measuring variances from the project plan. Implementation of the integrated change control process establishes control over project activities.

Project Communications – The process that insures the generation, collection, dissemination and storage of project information. Project communications includes communications planning, information distribution, performance reporting and administrative closure.

Project Initiation – see *Initiation*

Project Life Cycle – A collection of generally sequential project phases whose name and number are determined by the control needs of the organization or organizations involved in the project.

Project Management – The application of knowledge, skills, tools, and techniques to project activities in order to meet the project requirements.

Project Management Framework – The processes used to manage a project from initiation to closeout. The VA IT Project Management Framework includes the milestone reviews, the monthly performance reviews, the VA IT Acquisition process, integrated with the process groups of initiating, planning, executing, controlling and closing.

Project Management Information System (PMIS) – A system that facilitates project information flow within an organization.

Project Management Office (PMO) – The organization, either at the enterprise, Administration, and/or project level that aids Project Managers with standards, tools and techniques. The PMO maintains project metrics and in most cases monitors and consolidates project cost reporting

Project Management Plan – A management summary document that gives the essentials of a project in terms of its objectives, justification, and how the objectives are to be achieved. It describes how major activities of the project management function are to be accomplished (project execution), and describes the methods of overall project control. The project management plan includes the subsidiary plans covering the project management knowledge areas.

Project Management Process – Overlapping activities occurring at varying intensities, throughout each phase of the project.

Project Management Software – A class of computer applications specifically designed to aid with planning and controlling project costs and schedules.

Project Management Team – The members of the project team who are directly involved in project management activities. On some smaller projects, the project management team may include virtually all of the project team members.

Project Manager (PM) – The individual responsible for managing a project.

Project Master Schedule – A detailed schedule, based on project milestones and deliverables, that integrates all aspects of the project. The Project Master Schedule is using the Work Breakdown Structure (WBS).

Project Performance Reports – see *Performance Reporting*

Project Phase – A collection of logically related project activities, usually culminating in the completion of a major *deliverable*.

Project Management Plan – A formal, approved document used to guide both project execution and project control. The primary uses of the project plan are to document planning assumptions and decisions, facilitate communication among stakeholders, and document approved scope, cost, and schedule *baselines*.

Project Management Plan Development – Integrating and coordinating all project plans to create a consistent, coherent document.

Project Management Plan Execution – Carrying out the project plan by performing the activities included therein.

Project Planning – The development and maintenance of the project plan.

Project Procurement Management – A subset of project management that includes the processes required to acquire goods and services to attain project scope from outside the performing organization. It consists of procurement planning, solicitation planning, solicitation, source selection, contract administration, and contract closeout.

Project Procurement Management Plan – See Procurement Management Plan

Project Quality Management – A subset of project management that includes the processes required to ensure that the project will satisfy the needs for which it was undertaken. It consists of quality planning, quality assurance, and quality control.

Project Schedule – The planned dates for performing activities and the planned dates for meeting *milestones*.

Project Scope – The work that must be done to deliver a product with the specified features and functions.

Project Scope Management – A subset of project management that includes the processes required to ensure that the project includes all of the work required, and only the work required, to complete the project successfully. It consists of initiation, scope planning, scope definition, scope verification, and scope change control.

Project Sponsor – Executive level person or organization that champions the project goals. In some cases, but not all, the project sponsor may control the financial resources for the project.

Project Status Report – Details the current and upcoming activities on the project. Also can report on performance related to project scope, schedule and cost.

Project Team Members – The people who report either directly or indirectly to the *Project Manager*.

Project Team Resources – Generally refers to personnel assigned to the project team. May include skill descriptions and availability.

Project Time Management – A subset of project management that includes the processes required to ensure timely completion of the project. It consists of activity definition, activity sequencing, activity duration estimating, schedule development, and schedule control.

Qualitative Risk Analysis – Performing qualitative analysis of risks and conditions to prioritize their effects on the project objectives. It involves assessing the probability and impact of project risks and using methods such as the *probability and impact matrix* to classify risks into categories of high, moderate, and low for prioritized risk response planning.

Quality Assurance (QA) – (1) The process of evaluating overall project performance on a regular basis to provide confidence that the project will satisfy the relevant quality standards. (2) The organizational unit that is assigned responsibility for quality assurance.

Quality Control (QC) – (1) The process of monitoring specific project results to determine if they comply with relevant quality standards and identifying ways to eliminate causes of unsatisfactory performance. (2) The organizational unit that is assigned responsibility for quality control.

Quality Management – A collection of quality policies, plans, procedures, specifications, and requirements is attained through quality assurance (Managerial) and quality control (Technical).

Quality Management Plan – address what will be measured, how it will be measured, the responsibility for those activities and how quality improvement will be implemented during the course of the project.

Quality Planning – Identifying which quality standards are relevant to the project, and determining how to satisfy them.

Quantitative Risk Analysis – Measuring the probability and consequences of risks and estimating their implications for project objectives. Risks are characterized by probability distributions of possible outcomes. This process uses quantitative techniques such as simulation and decision tree analysis.

Reserve – A provision in the project plan to mitigate cost and/or schedule risk. Often used with a modifier (e.g., management reserve, contingency reserve) to provide further detail on what types of risk are meant to be mitigated. The specific meaning of the modified term varies by application area.

Resource – People, equipment and/or materials used to accomplish activities.

Rework – Action taken to bring a defective or nonconforming item into compliance with requirements or specifications.

Risk – An uncertain event or condition that, if it occurs, has a positive or negative effect on a project's objectives.

Risk Category – A source of potential risk reflecting technical, project management, organizational, or external sources.

Risk Containment Plan – A document detailing all identified risks, including description, cause, probability of occurring, impact(s) on objectives, proposed responses owners and current status. Also referred to as *risk response plan*.

Risk Event – A discrete occurrence that may affect the project for better or worse.

Risk Identification – Determining which risk events might affect the project and documenting their characteristics.

Risk Management – The art and science of identifying, analyzing, and responding to risk factors throughout the life of a project and in the best interests of its objectives.

Risk Management Plan – Documents how risk processes will be carried out during the project. This is an output of Risk Management planning.

Risk Mitigation – Risk mitigation seeks to reduce the probability and/or impact of a risk to below an acceptable threshold.

Risk Monitoring and Control – Monitoring residual risks, identifying new risks, executing risk reduction plans, and evaluating their effectiveness throughout the project life cycle.

Risk Response Plan – See *risk containment plan*.

Schedule Baseline – See Baseline

Schedule Control – Controlling changes to the schedule.

Schedule Critical Path – Activities or tasks in a project schedule that, if the duration changes, will either shorten or lengthen the total duration of the project.

Schedule Dependency – The linking of tasks in a project schedule in order of execution or implementation. Example: task must be completed before task B.

Schedule Development – Analyzing activity sequences, activity durations, and resource requirements to create the project schedule.

Schedule Management – Updating the project master schedule and comparing progress with the baseline schedule. Changes to the project schedule are managed through the Integrated Change Control Plan.

Schedule Performance – Comparing the project master schedule with the baseline schedule to determine slippage or changes in scope.

Schedule Performance Index (SPI) – The schedule efficiency ratio of earned value accomplished against the planned value. The SPI describes what portion of the planned schedule was actually accomplished. SPI is calculated as $(SPI = EV/PV)$.

Schedule Variance (SV) – (1) Any difference between the scheduled completion of an activity and the actual completion of that activity. (2) In *earned value*, $(SV = EV - PV)$.

Scope – The sum of the products and services to be provided as a project. See *project scope* and *product scope*.

Scope Change – Any change to the *project scope*. A scope change almost always requires an adjustment to the project cost or schedule.

Scope Change Control – Controlling changes to *project scope*.

Scope Creep – Any change to the *project scope* (products and services described by the project) that happens incrementally and is subtle in recognition.

Scope Definition – Subdividing the major *deliverables* into smaller, more manageable components to provide better control.

Scope Management – See Integrated Change Control

Scope Planning – The process of progressively elaborating the work of the project, which includes developing a written scope statement that includes the project justification, the major deliverables, and the project objectives.

Scope Statement – The scope statement provides a documented basis for making future project decisions and for confirming or developing common understanding of project scope among the stakeholders. As the project progresses, the scope statement may need to be revised or refined to reflect approved changes to the scope of the project.

Scope Verification – Formalizing acceptance of the *project scope*.

Section 508 – Refers to Section 508 of the Rehabilitation Act of 1973 (29 U.S.C. 794d), which requires Federal agencies to develop, procure, maintain, or use electronic and information technology (EIT) that is accessible to Federal employees and members of the public with disabilities.

Simulation – A simulation uses a project model that translates the uncertainties specified at a detailed level into their potential impact on objectives that are expressed at the level of the total project. Project simulations use computer models (e.g., Monte Carlo technique) and estimates of risk at a detailed level.

Solicitation – Obtaining quotations, bids, offers, or proposals as appropriate.

Source Selection – Choosing from among potential sellers.

Sponsor – see *Project Sponsor*

Staff Acquisition – Getting needed human resources assigned to and working on the project.

Stakeholder – 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.

Start Date – A point in time associated with an activity's start, usually qualified by one of the following: actual, planned, estimated, scheduled, early, late, target, baseline, or current.

Statement of Work (SOW) – A narrative description of products or services to be supplied under contract.

Strategic Management Council (SMC) – Chaired by the Deputy Secretary. Recommends to the Secretary and the VAEB, project management policy, strategic direction, resource allocations and performance in key areas.

System Deployment – Addresses the Project Closing Phase, Step 4 of the VA system Development Life Cycle. Project Closing is performed once all defined project objectives have been met and the customer has accepted the project’s product. Refers to transferring the project output to the customer.

System Development – A project life cycle phase encompassing the design, integration and demonstration of the project output. Generally follows the planning phase and is usually accomplished in conjunction with the execution and control process groups.

System Development Life Cycle – varies by project output. For example in the construction the System Develop Life Cycle could be described as feasibility, planning, design, construction and turnover. For software development a spiral (the life cycle repeats until complete) process is employed: requirements identification, system design, build and rebuild, and evaluation.

System Development Methodology – The type of methodology to be used in a system development project, e.g. Rational Unified Process, Spiral Development, Iterative Development, System Development Methodology, Information Engineering Methodology, or Rapid Application Development Methodology.

System Operation – The phase in the system life cycle where the system is in use and on-going activities such as regular maintenance and improvement are underway.

System Prototype – A development model that is used for testing in an operational environment. Typically built to be modified into the production model.

Task – A generic term for work that is not included in the work breakdown structure, but potentially could be a further decomposition of work by the individuals responsible for that work. Also, lowest level of effort on a project.

Triggers – Triggers, sometimes called risk symptoms or warning signs, are indications that a risk has occurred or is about to occur. Triggers may be discovered in the risk identification process and watched in the risk monitoring and control process.

User – Usually a member of the customer’s organization. Person or organization that will operate the project’s output.

Variance – Divergence from plan. For example if the schedule falls behind it is said to have negative variance. A variance is typically expressed in explicit terms such as a \$200,000 overrun. Variance can also be expressed as an index, in which case a schedule performance index of .89 would mean the schedule is 11 percent behind the baseline plan (schedule).

Work Activities – Sometimes called tasks. Generally project events or efforts that make up a schedule. Activities have a duration (time), consume resources and in most cases are dependent or result from other activities.

Work Activity Durations – The amount of time it takes to accomplish the work. Can be expressed in hours, day, weeks, or months.

Work Breakdown Structure (WBS) – A deliverable-oriented grouping of project elements that organizes and defines the total scope of the project. Each descending level represents an increasingly detailed definition of a project work.

Work Breakdown Structure (WBS) Baseline – The process of freezing the WBS to measure the affect of change. When the WBS is baselined, change control is applied and change is assessed against other aspects of the project, such as cost and schedule.

Work Package – A deliverable at the lowest level of the work breakdown structure, when that deliverable may be assigned to another Project Manager to plan and execute. This may be accomplished through the use of a subproject where the work package may be further decomposed into *activities*.

Zachman Cell – The Zachman Framework is guide for developing and managing an enterprise architecture. It consists of a grid with columns titled: data, function, network, people, time and motivation and rows titled: scope, business model, system model, technology model and detailed representation. A specific cell might represent the scope of the data aspect of the enterprise data infrastructure.