

## Project Planning (PP) Requirements Technical Proposal Response

**Bidder’s Name: Enter Bidder Name Here**

**Instructions:**

- For each requirement contained within this document a response is required.
- If additional space is needed Bidder should clearly label their response with the requirement identifier.
- NYS reserves the right to allow the Bidder to correct obvious errors of omission.
- Within each of the responses, identify which requirements from Attachment 2.01 – Technical Proposal – Functional Requirements Matrix will be met.

As part of the Technical Proposal, each Bidder must deliver a comprehensive Project Plan that clearly articulates a roadmap for success in implementing its solution. Bidders should refer to the NYS Guidebook for Project Management (available at <http://www.its.ny.gov/pmmp/guidebook2/index.htm>) and/or the Project Management Body of Knowledge (PMBOK) in formulating their response.

The purpose of the Project Plan response is to allow each Bidder to clearly articulate its methodology and process for the delivery and deployment of the proposed test management system. Proposed timeframes, staffing requirements and other management tools, (e.g., risk management and quality management) must be included. A term and condition of the resulting contract will be that these proposals will be reviewed and agreed to by NYS Project Manager and Contractor following project kickoff.

**Onsite requirements for Contractor Key Project Staff**

It is expected that the contractor will locate Key Project Staff at customer site as is necessary to:

- coordinate work activities,
- provide project communications,
- interact with NYS Subject Matter Experts (SME), and
- develop business expertise with the goal of a successful and timely project completion.

It is anticipated that the onsite requirements for Key Project Staff may change as the needs of the project changes based on project phases. Please see below for the minimum Key Project Staff resources and onsite requirements:

<b>Key Project Staff minimum Onsite Requirements</b>			
<b>Key Project Staff Titles</b>	<b>During Pre-Implementation Activities (to include Data Conversion and Customization/Configuration)</b>	<b>During Implementation (to include Acceptance testing)</b>	<b>During On-going support</b>
<b>Project Manager</b>	Minimum of 3.5 business days/week	Minimum of 3.5 business days/week	As needed to support the project objectives
<b>Technical Architect</b>	As needed to support the mutually agreed to project plan	As needed to support the mutually agreed to project plan	At the discretion of the Contractor to support project objectives

<b>Key Project Staff minimum Onsite Requirements</b>			
<b>Key Project Staff Titles</b>	<b>During Pre-Implementation Activities (to include Data Conversion and Customization/Configuration)</b>	<b>During Implementation (to include Acceptance testing)</b>	<b>During On-going support</b>
<b>Business Analyst</b>	Full time during normal business hours of the NYS business experts. The hours will be agreed to prior to project start.	At the discretion of the Contractor to support project objectives	At the discretion of the Contractor to support project objectives
<b>Tester</b>	At the discretion of the Contractor to support project objectives	Full time during normal business hours	At the discretion of the Contractor to support project objectives
<b>Contractor Defined</b>	At the discretion of the Contractor to support project objectives	At the discretion of the Contractor to support project objectives	At the discretion of the Contractor to support project objectives

Accommodations to the Key Project Staff minimum Onsite requirements in Table above, will be made on an as-needed basis (e.g., vacations, illness) and after notice and approval of the NYS Project Manager.

Bidder must clearly articulate all contractor staff assumptions made in the formulation of their proposal.

Each Bidder’s proposed Project Plan must include the following elements:

<b>Rqmt. No.</b>	<b>Requirement Description – Project Scope Description</b>
PP1	<p>The Project Scope Description shall be a narrative which explains all work to be performed by the Bidder to meet the project deliverables and requirements of the TMS as stated within the content of this RFP. Address the following scope of services (and others as appropriate):</p> <ul style="list-style-type: none"> <li>• Project Planning and Project Management</li> <li>• Application Strategy, Architecture and Planning</li> <li>• Detailed Requirements Definition</li> <li>• Design Specification</li> <li>• Configuration/Programming/Development/Integration</li> <li>• System Testing and Acceptance Testing</li> <li>• Product Implementation and Deployment</li> <li>• Communications</li> <li>• Training and Change Management</li> <li>• Knowledge Transfer</li> <li>• Post Implementation Maintenance and Support</li> </ul>

Bidder PP1 Response:

Rqmt. No.	Requirement Description – <b>Project Schedule</b>
PP2	<p>The comprehensive Project Schedule must include a detailed list of the tasks and the resources (e.g., Bidder and NYS), timeframes, deliverables and dependencies for each task.</p> <p>It is highly desirable that a fully functional test management system is implemented by the Contractor no later than 12 months following approval of the Contract; regardless, the Project Plans shall reflect the timing of the proposed implementation schedule including acceptance testing within the specified time period.</p> <p>“Fully Functional” means the following:</p> <ul style="list-style-type: none"> <li>• The conversions for the Test Management System have been accomplished and the software has been delivered, installed and accepted for the test and production systems; and</li> <li>• Acceptance testing has been successful, with all requirements (COTS and custom) proven and chosen optional features have been met; and</li> <li>• The production system has been implemented and all TMS functions have been transitioned to the new TMS.</li> </ul> <p>All critical milestones, deliverables, tasks, timeframes, dependencies and the schedules’ critical path shall be clearly delineated within the Project Schedule. The project schedule should align with the defined milestone deliverables listed in the Cost Proposal.</p> <p>The Project Schedule must be fully resourced – all technical and functional roles (Bidder and NYS) required to meet the deliverables must be clearly identified.</p> <p>The Project Schedule shall include, but not be limited to:</p> <ol style="list-style-type: none"> <li>a. the configuration process;</li> <li>b. the conversion/migration of data;</li> <li>c. the acceptance of all software components;</li> <li>d. the acceptance by NYS of the successful results of all technical requirements testing;</li> <li>e. the preparation of all software components in the production environment;</li> <li>f. holding of initial onsite online examination (as soon after contract start date as feasible);</li> <li>g. any Bidder customization of COTS software.</li> <li>h. rollout/Go-live including successful holding of statewide online examination.</li> </ol> <p><b>Each Bidder must provide a comprehensive Project Schedule on a thumb drive in Microsoft Project standard format.</b> The plan must also include an MS Project view which clearly depicts a) critical path and b) major deliverables.</p>

Bidder PP2 Response:

Rqmt. No.	Requirement Description – <b>Narrative Description of Project Plan</b>
PP3	Each Bidder must provide a narrative description of the Project Plan for implementation that including tasks, resources, timeframes, deliverables and dependencies that should be mapped to the financial proposal milestones (please do not include dollars in this section). This must also include the expected timeline for the preparation of hardware by NYS for all environments proposed by the Bidder, for the delivery and deployment of the proposed TMS application.

Bidder PP3 Response:

Rqmt. No.	Requirement Description - <b>Staffing Management Plan</b>
PP4	<p>Each Bidder must describe their Staffing Management Plan:</p> <ol style="list-style-type: none"> <li>a. Clearly delineated roles and responsibilities of both the Bidder and NYS organizations for all phases of the project <ol style="list-style-type: none"> <li>i. Staff requirements for both Bidder staff and corresponding NYS staff required to implement the TMS solution must be identified, including category of skill, skill set expectation, number of people by skill set and number of hours for each skill. The Bidders must clearly articulate the number and type of staff for the entire project and differentiate the roster between their implementation team and their post-implementation support/maintenance team.</li> </ol> </li> <li>b. The names and brief description of experience of the Contractor Key Project Staff assigned to the project that will work directly with the NYS designated representative. At a minimum the Contractor Key Project Staff must include a Project Manager who must meet the following criteria and responsibilities: <ol style="list-style-type: none"> <li>i. The Contractor must provide a full-time Project Manager (PM) dedicated to this project.</li> <li>ii. The proposed Project Manager submitted by the Contractor must have experience within the last five (5) years managing projects involving the implementation of large scale test management systems.</li> <li>iii. The proposed Project Manager must be fluent in the English language (i.e., speaks, reads, writes, understands, and comprehends English fluently).</li> <li>iv. The proposed Project Manager must be responsible for directing the Contractor resources, coordinating and communicating with the NYS Project Manager and ensuring the project deliverables are met according to the approved project plan.</li> <li>v. Following approval of the Contract, the Project Manager submitted by the Bidder must be the Bidder's legal agent and NYS prime contact with regard to all provisions of the Contract. The Project Manager must be made available to the NYS project at inception (full time) and remain with the project through any Warranty period.</li> </ol> </li> <li>c. The Bidder must comply with Key Project Staff minimum Onsite Requirements Work for Key Project Staff per the requirements Table above.</li> </ol>

	<p>d. If applicable, the Bidder must describe their approach to problem resolution with any Subcontractor during the term of the project. Working with the Bidder, NYS will have input into the final approach.</p> <p><b>Note:</b> The Bidder will be solely responsible, to NYS, for work products produced by any subcontractor.</p>
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Bidder PP4 Response:

Rqmt. No.	Requirement Description – <b>Risk Management Plan</b>
PP5	<p>Critical projects demand management of risk, and a plan for mitigating actions to be deployed to manage risk before it impacts the project schedule or project success.</p> <p>Each Bidder is required to submit a Risk Management Plan. The Plan must clearly articulate the methods to be utilized in the identification of potential risks; the procedures utilized to predict the likelihood that a risk will occur; the methods for quantifying the potential impact to the project; and, the methods for development of action plans to mitigate the impact of that risk occurrence. The Bidder must include information regarding best practices and, if applicable, lessons learned during the implementation of other complex TMS solutions that have been incorporated into the proposed Risk Management Plan.</p>

Bidder PP5 Response:

Rqmt. No.	Requirement Description – <b>Change Management Plan</b>
PP6	<p>A standard change management procedure will ensure that changes are handled efficiently and timely during the course of the project. The Bidder must provide a Change Management plan that will describe the process for making any adjustment to any aspect of the project plan or to any already approved deliverable(s). This includes anything formally documented in the project plan, or any deliverable produced during the course of the project.</p> <p>The Change Management Plan for the project should include:</p> <ol style="list-style-type: none"> <li>a. Identification of who is authorized to request a change,</li> <li>b. Identification of who is responsible for determining the Scope, Schedule, and Quality impacts of the change request,</li> <li>c. Identification of who is responsible for analyzing the request’s impact on the Project Cost,</li> <li>d. Identification of who is responsible for approving the request,</li> <li>e. Timeframe (number of business days) allowed for a change request to be approved or rejected,</li> <li>f. Process to follow if no timely decision on approval or rejection of a change request is made,</li> </ol>

	g. Percent of the overall Project Budget that has been reserved for project changes.
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Bidder PP6 Response:

Rqmt. No.	Requirement Description – <b>Communications Plan</b>
PP7	<p>The Bidder must provide a communications plan that describes how communications will be managed on the project including:</p> <ul style="list-style-type: none"><li>a. Identification of all stakeholder roles and channels for communication,</li><li>b. Project information collection and storage procedures,</li><li>c. Project information disseminate procedures,</li><li>d. The distribution structure, specifically detailing what, how, and when information will be shared with stakeholders,</li><li>e. The method by which information will be accessed if it is needed between regularly scheduled communications.</li></ul>

Bidder PP7 Response: