

Legend: Projects Anticipated to be Closed in 30 Days Projects Completed

#	Area	Project	Status
1.	<b>Infrastructure</b>	Cloud Migration	In progress and on schedule. Contact Center self-service enhancements undergoing development. See Cloud Migration (C2C) Operational Work Plan.
2.		Cloud Application Performance Management	Project closed out in February 2023.
3.	<b>Software - Architecture Modernization</b>	SDLC DevOps	Project closed out in March 2023.
4.		.NET & ORM Upgrade	Project closed out in November 2022.
5.		Rules Engine	In progress and on schedule. Business Rules Catalog is being developed. See Rules Engine Operational Work Plan.
6.		SOA and API Layer	Project closed out in April 2023. See SOA and API Layer Operational Work Plan.
7.		RA Help Center	Project closed out in December 2021.
8.	<b>Software - Procurement</b>	Strategic Planning Office (SPO)	In progress and on schedule.
9.		Oversight (IV&V)	In progress and on schedule.
10.		System and Software Integration (SSI)	In progress and on schedule. Contract amendment executed. Test cases are undergoing review and updates. See System and Software Integration Operational Work Plan.
11.	<b>Software – Incremental CX/UX Mobile Responsive Software Transformation, including Business Process Optimization</b>	BPO	BPO project closed out in October 2022.
12.		CX/UX	CX/UX in progress and behind schedule. Increased communication and accountability remain the focus with the technology contractor, especially for a detailed project schedule and design documents. Communications contractors on schedule. See CX/UX Operational Work Plan.
13.	<b>Data and Analytics</b>	Data Warehouse	Project closed out in January 2022.
14.		Reporting	Project closed out in March 2023.
15.		Archival and Purge	In progress and on schedule. Detailed project requirements and a Request for Information are underway to support current and continuous modernization. See Archive & Purge Operational Work Plan.
16.		Master Data Management and Interoperability	Project closed out in March 2023.
17.	<b>Security</b>	Security Architecture Review	Project closed out in October 2022.
18.		Identity Management and User Authentication	In progress and on schedule. Phase one of three, focused on claimants, was completed in September 2021. Phase two of three, focused on employers and third-party administrators, is postponed to post-modernization. Contract executed with Ernst & Young to implement phase three, which is focused on staff, is in progress. See Identity and Access Management Operational Work Plan.
19.		Security Architecture Audit	Postponed to post-modernization.

**Are there any scope changes?**

There were no scope changes this reporting period.

**Is the project currently within budget?**

The project is currently under budget.

**Do you expect the project to remain within budget?**

Yes

**If the project is not on schedule, briefly explain why and what the agency is doing to bring the project back on schedule.**

The Program is on schedule. The Department has developed proactive measures and continues to mitigate any obstacles that could impact project schedules. For example:

1. The Department has closed a staffing resources risk previously identified by the Reemployment Assistance Modernization Program's IV&V vendor as a high-level risk. This is a result of:
  - Proactive outreach with staff augmentation vendors to gain insights to increase both the quality and quantity of specialized information technology professionals;
  - Offering flexibilities for remote work and competitive pay, as needed. The Department initiated full-time remote work for critical IT positions in May 2022 to help promote hiring and retention;
  - Including a staffing requirement in all technology procurements; and
  - Leveraging a resource capacity analysis tool to better understand where existing resources are over-committed and to help identify the most critical vacancies to be filled.
2. The Department has applied lessons-learned to reduce procurement-related delays that the Reemployment Assistance Modernization Program's IV&V vendor originally classified as either a high or medium risk, though some risks are trending downward or have been subsequently closed. To mitigate these issues, the Department has:
  - Included the Department's Vendor Core Contract in solicitation documents to ensure vendors are provided the Department's terms and conditions as early as possible.
  - Established priorities with vendors who are developing project requirements to fast-track procurement development.
  - Developed well-defined scopes of work and detailed project requirements for the remaining technology projects, to ensure vendors are provided clear direction at the outset of each project.
3. The Department has worked closely with other states and the National Association of State Workforce Agencies to apply best-practices and develop innovative solutions to satisfy burdensome regulatory compliance requirements. For example, to comply with IRS Publication 1075:
  - The Department developed a manual workaround for Appeals cases that contain Federal Tax Information (FTI).
  - The Department developed a process where contractors can build a database for FTI that DEO staff can manage.
4. The Department sharpened the scope of the Modernization Program to help ensure the overall Program's benefits are achieved by June 30, 2023. This process allows the Department to focus its efforts on critical path tasks and activities, ensure resources are allocated, and that System users are provided an enhanced mobile-responsive user interface for filing and managing their Reemployment Assistance claims.
  - Two projects' scopes were realigned with the iSF Final Report. The Identity and Access Management project and Master Data Management and Interoperability project scopes were originally expanded to include the acquisition and installation of tools that would be leveraged agency wide in the future. The Department removed the procurement of these tools from each projects' scope to prevent resource constraints that could compete with developing a front-end mobile-responsive user interface.

- Two projects' scopes were clarified to focus on the mobile-responsive user interface. The Department shifted the focus of Rules Engine project and SOA and API Layer project scopes so that the tools provided by each project will prioritize developing new functionality for the mobile-responsive user interface. Incremental enhancements, including redeveloping existing System functionality in the new tools, will occur in post-modernization.
- One project was de-scoped from the overall Modernization Program. The Security Architecture Audit is intended to confirm the resolution of architectural deficiencies identified during the Security Architecture Review project. However, the iSF Final Report did not contemplate the timeline or other resources that would be necessary to resolve the identified deficiencies. The Department has begun working toward resolving the deficiencies and will defer the Security Architecture Audit project to post-modernization.
- On February 10, 2023, DEO executed an agreement with its prime technology vendor, Strategic Communications, which is providing technology solutions and services for a mobile-responsive user interface, integration platform, and a business rules engine. The full Statement of Work was executed on March 8, 2023, with the prime and its sub-technology vendor, Tata Consulting Services. The Department is actively managing this contractor closely and has proactively initiated daily accountability meetings to ensure the contractor's employees are fully onboarded, deliverables are submitted, and milestones are being met to support a July 1, 2023, launch; however, the quality of some of the contractor's work and the pace at which work is being performed is a concern.

#### Major Project Tasks and Activities Accepted or In Progress this Reporting Period

- [Infrastructure] Cloud Migration: In progress and on schedule. This project includes transitioning the System from operating on hardware stored on-premise to a cloud-based environment to ensure all aspects of the System are available to users during periods of high demand for continuous claims processing, including both web-based and call center services.
  - Following the migration of the System to the cloud, several issues were identified that impacted Department staff and claimants, such as the Appeals Unit's ability to schedule Appeals hearings and properly access and redact appeals documentation, which resulted in 12 defect tickets being logged. The Department has resolved 11 of these defects and continues to evaluate how to resolve the final defect. More information will be provided by the next reporting period.
  - The Visual Interactive Voice Response technology vendor continues to work with DEO, and is currently testing functionality that will be used to enhance the Department's existing Customer Call Center technology and provide additional self-service options for Reemployment Assistance claimants. A mid-May deployment is anticipated.
  - The Department continued development of ChatBot technology this reporting period, including the development of plain language for System users. ChatBot development work is complete and is undergoing testing; however, the Department was informed that a software upgrade would be required before the end of the calendar year to continue utilizing this feature, which may impact the forecasted May deployment date. The Department is researching all options for this type of self-service, including costs, and will provide more information in the next reporting period.
- [Software] Rules Engine. This project includes utilizing a software tool that serves as a separate infrastructure environment for managing and executing business rules that govern how Reemployment Assistance claims are processed. By using a rules engine to manage and operate business rules, specifically those rules that are updated periodically to accommodate changes in state or federal law, the Department would gain staff efficiency and help support System performance. A rules engine is more user-friendly and does not require System code changes, which means information technology staff could be repurposed for larger, more complex System enhancements and

business rule changes requiring code changes could be deployed faster. Additionally, because the rules engine operates in a separate infrastructure environment, it would allow for increased System performance.

- The Department continues working to develop an initial catalog of business rules that will be used to develop a continuous modernization plan for the business rules engine. The catalog will identify all business rules that govern the administration of the Reemployment Assistance program, the number of times each rule has changed, the date(s) each rule has changed, the relative complexity of each rule, and determine if there is need for a business rules engine. This is a labor-intensive process that is anticipated to be complete in May 2023.
- [Software] SOA and API Layer. This project will help promote a more efficient System by creating a layer between various components of the System that serves as the messenger for all data exchanges. This layer helps prevent a downturn in System performance by offloading demand on the System.
  - The SOA and API Layer software project has been complete; however, all remaining activities that will connect the System with the new mobile-responsive user interface will be tracked as part of the Incremental CX/UX Mobile Responsive Software Transformation project.
- [Planning, Coordination, and Oversight] Strategic Planning Office. This project equips the Department with standards, governance, and project management services for the Reemployment Assistance Modernization Program, and oversees the Program's scope, schedule, and budget to promote accountability and alignment with Department priorities.
  - The Strategic Planning Office (SPO) continues to provide overall Program and project management support.
- [Planning, Coordination, and Oversight] Independent Verification and Validation. This project includes leveraging an independent third-party consultant to provide objective and proactive risk identification and assessment to the Department. Observations and risks identified by the consultant are used by the Department to implement the Reemployment Assistance Modernization Program and any necessary mitigating strategies.
  - IV&V continues to attend various Department meetings to support Program and project oversight.
- [Planning, Coordination, and Oversight] System and Software Integration. This project includes leveraging the expertise of a third-party services provider with experience in strategic planning, System design, System development, and System integration for large multi-component system modernization efforts to ensure the Department's various modernization projects work as intended to deliver an enhanced user experience.
  - The Department executed a contract amendment to add a Test Manager and testing team to support developing test cases and provide a level of coordination across the various testing activities and team, a business needs strategy to help prioritize continuous modernization activities, and security support services to ensure security is central to all System planning and architecture.
  - The SSI is actively working with Department Subject Matter Experts to finalize use test cases and requirements.
  - The SSI and CX/UX vendors are working with the Department to develop performance requirements that document how the modernized System must behave.
- [Software] Incremental CX/UX Mobile Responsive Software Transformation. This project includes optimizing the existing System and developing a user-friendly front-end for Reemployment Assistance claimants that is also mobile-friendly. The transformation will occur incrementally to ensure all System users benefit from System optimization, with a focus on enhancing the claimant experience first.
  - Timely deliverable submission and deliverable quality remain a concern. The Department meets daily with both the prime and subcontractor to increase accountability and provide specific feedback about aligning the deliverables with the contract. The Department continues to evaluate impacts to the overall Program timeline; however, without a detailed project schedule, it is difficult to forecast additional delays to the technology implementation timeline. If delays are realized, it would increase the likelihood of postponing a July 2023 launch of the new mobile-responsive user interface. The prime and subcontractor are focusing their design and

development on the initial Reemployment Assistance claims application and the application for Disaster Unemployment Assistance.

- The Communications contractors continue to make steady progress toward developing plain language for in-scope claimant-facing screens and has developing plain language for the next phase of the mobile-responsive user interface, which focuses on appeals.
- The Communications contractors provided several options for updating the current System’s brand, including preliminary draft logos. These options will continue to be refined over the coming weeks to finalize the new brand.
- [Data and Analytics] Archival and Purge. This project establishes a process for archiving and purging appropriate Reemployment Assistance data. These activities will reduce the Department’s data storage costs and greatly impact the efficiency and stability of the System, because it will purge any data that is no longer required to be maintained by the Department and allow for the secure storage in a separate environment of any data that the Department must maintain according to the state’s records retention schedule.
  - A Request for Information has been developed to help inform the Department if a suitable technology tool for archiving and purging data exists in the marketplace and is currently being reviewed internally before advertisement.
  - Detailed archive and purge data requirements are being developed to support the current project and continuous modernization efforts to support the archival and purging of data from the existing System database.
- [Security] Identity and Access Management. This project includes updating all Departmental identity management and access control policies and implementing enhanced front-end security measures to authenticate System users. These efforts ensure the individuals who have access to the System are provided the appropriate amount of access for their need.
  - Ernst & Young has completed three deliverables and has submitted two more for the Department’s review.
- [Security] Security Architecture Audit. This project includes a technical audit that will be provided by an independent third-party to review and test all technical aspects of the System for improved System security.
  - This project has been deferred to post-modernization.

**Procurement Status**

**COMPLETE**

- Independent Verification & Validation Request for Quote
- System and Software Integrator Request for Information
- Strategic Planning Office Request for Quote
- Business Process Optimization Request for Quote
- System and Software Integration Request for Quote
- Security Architecture Review Request for Quote
- Rules Engine, SOA and API Layer, and Master Data Management and Interoperability Request for Information
- Rules Engine, Integration Platform, and Mobile-Responsive User Interface Request for Quote
- Identity and Access Management Request for Quote

**IN PROGRESS**

- |   |             |
|---|-------------|
| Archive and Purge Request for Information | <b>Date</b> |
| Post RFI                                  | April 2023  |
| Vendor deadline to submit questions       | May 2023    |

Department provides answers to vendor questions

May 2023



**OPERATIONAL WORK PLAN  
FOR  
CONNECT TO CLOUD  
(C2C)**

**FLORIDA DEPARTMENT OF ECONOMIC OPPORTUNITY  
DIVISION OF INFORMATION TECHNOLOGY  
AND  
DIVISION OF WORKFORCE SERVICES**

**FISCAL YEAR 2022-2023**

**QUARTER 4**

**PREPARED ON 4/26/2023**

**TABLE OF CONTENTS**

**SECTION 1 — OVERALL PROJECT PLAN ..... 3**

**I. PROJECT CHARTER..... 3**

A. SCOPE STATEMENT ..... 3

B. PROJECT OBJECTIVES AND BUSINESS BENEFITS ..... 4

C. CRITICAL SUCCESS FACTORS ..... 4

D. KEY DATES ..... 5

E. MAJOR DELIVERABLES..... 5

F. MAJOR MILESTONES..... 6

G. PROCUREMENT ..... 6

H. KEY STAKEHOLDERS ..... 7

I. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS..... 7

**II. RESOURCE LOADED PROJECT SCHEDULE ..... 10**

**III. PROJECT SPENDING PLAN ..... 16**

**IV. PROJECT ORGANIZATION AND METHODOLOGY ..... 16**

A. PROJECT ORGANIZATIONAL CHART ..... 16

B. PROJECT ROLES AND RESPONSIBILITIES..... 16

C. PROJECT MANAGEMENT METHODOLOGY ..... 18

**V. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN ..... 19**

**VI. PROJECT RISK MANAGEMENT PLAN..... 20**

**VII. CAPACITY PLAN..... 21**

## SECTION 1 — OVERALL PROJECT PLAN

### I. Project Charter

The Reemployment Assistance Claims and Benefits Information System (System) and supporting middleware software is currently deployed on physical, on-premises servers managed exclusively in-house. Most of the physical infrastructure is from the original go-live in 2013, is at the end of its life cycle, and is due for replacement by 2020. As the Department of Economic Opportunity (DEO) continues to assess and develop an understanding for choosing, managing, governing, and securing cloud services and tools; the realization is that cloud computing is the foundation that enables Workforces Services to transform, differentiate, and continuously improve.

A cloud first strategy plays a central role in next-generation business initiatives. These initiatives include digital business transformation, automation, and Artificial Intelligence (AI). Cloud computing offers enhanced disaster recovery and high availability, optimized operations and maintenance costs, and built-in scalability.

As part of the modernization initiatives, DEO is undertaking a project to complete the planning for remaining migration, readiness activities, and migration of Reemployment Assistance infrastructure from the State Data Center and Winter Haven Disaster Recovery sites, as well as moving the System to a Cloud Service Provider using an IaaS hosting model. Included within the migration project is an improved document storage solution and the transition to a cloud-based IVR solution. Once the migration is completed, focus on assessment of additional, long term, cloud costs, performance, and maintainability considerations such as utilization of pay-as-you-go models, and potential utilization of Platform as a Service (PaaS) as the long-term development and delivery model.

#### A. Scope Statement

Complete planning for remaining migration, readiness activities, and migrate Reemployment Assistance infrastructure from the State Data Center and Winter Haven Disaster Recovery (DR) sites, as well as moving the System to a Cloud Service Provider using an IaaS hosting model; implement an improved document and generation management solution; transition to a cloud-based IVR solution and implement additional Reemployment Assistance Contact Center enhancements.

##### **In Scope:**

- Migration of the System from the existing data center into the Azure Cloud.
- Transitioning to a Cloud Based IVR Solution.
- Building of a Disaster Recovery System.
- The ability to Scale Out the infrastructure to create a more robust and reliable System.

##### **Out Of Scope:**

- Changes to existing the System's workflows and processes

- Fixing pre-existing bugs in the System.

## B. Project Objectives and Business Benefits

The System and supporting middleware software is currently deployed on physical, on-premises servers managed exclusively in-house. Most of the physical infrastructure is from the original go-live in 2013, is at the end of its life cycle, and is due for replacement by 2020. As the DEO continues to assess and develop an understanding for choosing, managing, governing, and securing cloud services and tools; the realization is that cloud computing is the foundation that enables Workforces Services to transform, differentiate, and continuously improve. Moving the System to the cloud will allow for flexibility, stability, and future growth as well as the ability to handle larger load in case of emergency spikes in claimant requests.

Project Objective	Business Benefit
Complete migration plan and all application and database layer remediation and readiness modifications	<ul style="list-style-type: none"> <li>• Mitigate technical risks and unknowns associated with migration</li> </ul>
Migrate all System infrastructure to the Cloud using an IaaS hosting model	<ul style="list-style-type: none"> <li>• Cloud deployment and delivery models offer on demand resource acquisition and auto-scaling.</li> <li>• Cloud deployment and delivery models reduce or eliminate Cap-Ex and offer pay-as-you-go Op-Ex resource costs</li> <li>• Cloud deployment and delivery models provide cost and operational efficiencies</li> </ul>
Determine and implement improvements to document storage and workflow in IaaS ( <i>FileNET, content management which includes in BRAVA functionality and document management system</i> )	<ul style="list-style-type: none"> <li>• Cloud deployment and delivery models provide cost and operational efficiencies</li> </ul>
Determine and implement improved document management solution and select and implement IVR solutions in IaaS	<ul style="list-style-type: none"> <li>• Cloud deployment and delivery models provide cost and operational efficiencies</li> </ul>

## C. Critical Success Factors

The critical success of moving the System to the cloud will be measured using the CAPM tool metrics in the cloud as compared to the On Prem system to ensure performance matches or exceeds performance of the current CONNECT system. In addition, Disaster Recovery (DR) will become a more automated and streamlined option that will allow the DEO to recover from a disaster in less time than the on prem system, which currently uses a 72-hour outage window as its baseline.

- Migration of all System infrastructure to an IaaS hosting model
- Implementation of improved document storage and workflow solutions

- Implementation of improved document management solution
- Upgrade IVR solution in IaaS
- DR cloud migration solution and DR Plan
- Contingency Plan for non-cloud ready applications

#### D. Key Dates

The main key dates for the project are based on milestones along the project lifecycle that help to ensure the project stays on time and budget.

Key Date	Importance and Relevance to the Project
November 10, 2021	Cloud Migration – Connect to Cloud Kick-Off
November 18, 2021	IVR – Kick-Off
November 30, 2021	ULA Vendor under contract / PO issued
December 2, 2021	<del>FileNet RFQ submitted for Bid</del> (package pulled)
December 17, 2021	<del>FileNet Proposals Due</del> (package pulled)
December 26, 2021	Data Intensity Contract Executed
December 27, 2021	<del>Fairfax Proposal Received</del> (package pulled)
January 2, 2022	Oracle Upgrade from 12 to 19C Complete
January 27, 2022	FileNet Change in Approach
February 1, 2022	Data Intensity / Database Migration Kick-Off
March 11, 2022	2022 Session ends
May 9, 2022	.NET Upgrade
May 9, 2022	Database Migration
October 1, 2022	Object Relational Model
June 30, 2022	GTS / IVR Go Live
June 30, 2022	Phase I - FileNet Lift and Shift
September 30, 2022	Full System Testing in PreProd
September 30, 2022	Visual IVR and Chat Bot Plan in Place
October 28, 2022	Interfaces
December 1, 2022	Full Production Testing
February 11, 2023	Go Live
February 18, 2023	DARS
May 12th, 2023	Visual IVR Go Live

#### E. Major Deliverables

These Deliverables are tracked during the lifecycle of the project to ensure project performance.

Major Deliverable	Deliverable Description
Upgrade Network	Implement Palo Alto Firewalls
Oracle Upgrade	Oracle upgrade from 12 to 19C
IBM FileNET Upgrade	Upgrade to latest version 5.5.7
Remediate IBM FileNet	Move workflow and document management functionality to native cloud-based application

Major Deliverable	Deliverable Description
Object Relational Model	Upgrade to latest version and migrate to Azure environment
Database Migration	Migrate Oracle and SQL Databases to Azure environment
Application	Complete necessary refactoring and upgrade .NET framework from 4.0 to 4.6 and migrate to Azure environment
Active Directory	Complete deployment of AD in IaaS
Contact Center / IVR	Replace IVR system with cloud-based market leader
Defect Tracking and Load Runner	Upgrade/migrate HP ALM to Azure environment and implement Load Runner Cloud SaaS solution
Correspondence	Upgrade OpenText Blazon version and migrate to Azure environment; explore native cloud-based solutions to integrate Brava Viewer
Interfaces	Migrate SFTP server to Azure environment
Batch Management	Complete upgrade and migration of the UC4 servers to Azure environment
Testing Data Management	Select and implement COTS product

## F. Major Milestones

These Milestones are tracked during the lifecycle of the project to ensure project performance.

	Major Milestone	Milestone Description
1.	Execution of Vendor Contracts	Execution of multiple vendor contracts vital for the success of the project
2.	Network Upgrade	Implement Palo Alto Firewalls
3.	Oracle Upgrade	Upgrade to the latest version 19C
4.	IBM FileNET Upgrade	Upgrade to latest version 5.5.7
5.	Contact Center / IVR	Upgrade IVR to a cloud-based system
6.	Database Migration	Migrate 66 application servers VMs
7.	UAT Testing	Completion of User Acceptance Testing

## G. Procurement

The Procurements for this project were extensions to the IVR solution and the assistance for the upgrade and migration of the Automic UC4 product.

Procurement	Description	Justification	Needed By
C2191-A10 GTS Amendment	This amendment adds E911 functionality to the existing Genesys system	To be compliant, all users must have the ability to call 911	Complete

RFQ for Atomic Migration	Automatic Automation Upgrade and Migration to Azure Professional Services	UC4 is a critical component of the System, which handles batch job scheduling and automation. Migration support services are required to upgrade UC4 and migrate to the Azure platform.	Complete
--------------------------	---	---	----------

## H. Key Stakeholders

The Key Stakeholders for the project are key members of the team that assist in making decisions in project requirements, deliverables, and project goals.

Key Stakeholder	Project Interest
Lindsay Volpe	Deputy Secretary, Workforce Services, DEO
Domenic DiLullo	Chief Technology Officer, DEO
Allyce Moriak	Chief Financial Officer, DEO
Wendy Castle	RA Modernization Program Owner - Business
Benjamin Beha	RA Modernization Project Owner
Paul Forrester	CIO, RA Modernization Program Owner – Information Technology
David Sinclair	Project Manager
Peraton	System and Software Integrator

## I. Significant Project Assumptions and Constraints

Purpose: To identify important conditions affecting this specific project.

### Project Assumptions

- All identified funding is available.
- The identified System requirements are correct and complete.
- The assigned IT resources possess relevant knowledge and skills to complete the identified tasks.
- Members of the project team will have access to the necessary tools, hardware, and materials necessary to complete the identified tasks.
- All relevant stakeholders will attend required status meetings. However, there may be instances where some stakeholders are unavailable to attend.
- The project sponsor will be responsive and prepared to make decisions regarding the project cost, scope, and schedule.
- Key contracts are sequenced in relation to the project schedule.

### Project Constraints

- SMEs are over allocated to this, other Reemployment Assistance projects, and regular business activities.

- DEO continues to be challenged with securing staff resources.

## II. Work Breakdown Structure

The WBS was created based on the Project High Level deliverables along with the planned schedule for the project. The Project is managed using Initiation, Planning, Execution, Monitoring and Close out sections.

WBS	Task Name
<b>1</b>	<b>Connect to Cloud</b>
<b>1.1</b>	<b>Initiation</b>
1.2	Initiation Phase complete
<b>1.3</b>	<b>Planning</b>
1.3.1	Planning Phase Start
<b>1.3.2</b>	<b>Deliverable: Resource Plan</b>
1.3.3	Resource Plan Complete
<b>1.3.4</b>	<b>Deliverable: Project Schedule</b>
1.3.5	Project Schedule complete
<b>1.3.6</b>	<b>Deliverable: Project Management Plan</b>
1.3.7	Project Management Plan complete
<b>1.3.8</b>	<b>Deliverable: Project Budget</b>
1.3.9	Project Budget complete
<b>1.3.10</b>	<b>Deliverable: Project Spending Plan</b>
1.3.11	Project Spending Plan complete
<b>1.3.10</b>	<b>Deliverable: Project Test Plan</b>
1.3.11	Project Spending Plan complete
<b>1.3.12</b>	<b>Requirements:</b>
<b>1.3.13</b>	<b>Conduct Lessons Learned Meeting</b>
1.3.14	Deliverable: Planning Gate RCA Assessment
1.4	Planning Phase Complete
<b>1.5</b>	<b>Execution</b>
1.5.1	Execution Phase Start
<b>1.5.2</b>	<b>Phase 1 Infrastructure Build</b>
<b>1.5.2.1</b>	Lower Environment Build
<b>1.5.2.2</b>	Production Environment Build
<b>1.5.2.3</b>	<b>Phase 1 Complete</b>
<b>1.5.3</b>	<b>Phase 2 Testing</b>

<b>1.5.3.1</b>	Lower Environment Unit Testing
<b>1.5.3.2</b>	Lower Environment UAT / Smoke Testing
<b>1.5.3.3</b>	Production Environment Unit Testing
<b>1.5.3.4</b>	Production Environment UAT / Smoke testing
<b>1.5.3.5</b>	Production and Lower Interface Testing
<b>1.5.3.6</b>	<b>Phase 2 Complete</b>
<b>1.5.4</b>	<b>Go Live</b>
<b>1.5.4.1</b>	Mock Run Plan
<b>1.5.4.2</b>	Go No Go Meetings
<b>1.5.4.3</b>	Lessons Learned
<b>1.5.4.4</b>	<b>Go Live</b>
<b>1.6.0.0</b>	<b>Project Closure</b>

## II. Resource Loaded Project Schedule

The below Project Schedule is the final version of the project scheduled used and followed through go live on 2/13/23. DEO used Service Now as the project schedule tool for the project.

Task Name	Duration	Start	Finish	Predecessors	Resource Names
C2C	469 days	Tue 9/7/21	Fri 6/23/23		David Sinclair
Initiation	101.25 days	Fri 10/1/21	Mon 2/21/22		David Sinclair
Procurement	213 days	Tue 9/7/21	Thu 6/30/22		David Sinclair
Planning	176 days	Tue 9/7/21	Tue 5/10/22		David Sinclair
Execution	390 days	Mon 10/4/21	Fri 3/31/23		
Requirements Creation	36 days	Mon 10/4/21	Mon 11/22/21		David Sinclair
C2C Tasks	390 days	Mon 10/4/21	Fri 3/31/23		David Sinclair
Azure Training	141.75 days	Mon 10/4/21	Tue 4/19/22		
Oracle 19c Upgrade	38 days	Wed 12/1/21	Mon 1/24/22		Anand Kothandan
GOV Cloud Services	251 days	Thu 10/7/21	Fri 9/23/22		David Sinclair
DEVOPS Environment	134 days	Mon 2/28/22	Fri 9/2/22		Eddy Richards
PreProd Environment	74 days	Mon 4/4/22	Fri 7/15/22		Eddy Richards
IBM FileNet Phase 1	193.63 days	Mon 10/4/21	Thu 6/30/22		
Data Intensity Database Migration	193.75 days	Mon 10/4/21	Thu 6/30/22		David Sinclair
IVR to Cloud (GENESYS)	196 days	Fri 12/10/21	Fri 9/9/22		David Sinclair
DARS (GENESYS)	367 days	Mon 10/4/21	Tue 2/28/23		
Initiation	250 days	Mon 10/4/21	Fri 9/16/22		David Sinclair
Planning	35 days	Thu 8/25/22	Thu 10/13/22		
Project sub plans	12 days	Thu 8/25/22	Fri 9/9/22		
Project Schedule	35 days	Thu 8/25/22	Thu 10/13/22		
Execution	146 days	Mon 8/1/22	Tue 2/21/23		David Sinclair
Design	40 days	Mon 9/5/22	Mon 10/31/22		David Sinclair
Configure and Build - Lab	120 days	Mon 8/1/22	Fri 1/13/23		David Sinclair
Configure and Build - Production	92.4 days	Thu 9/15/22	Mon 1/23/23		David Sinclair
User Acceptance Testing	74 days	Tue 11/1/22	Fri 2/10/23		

Train the Trainer	7 days	Mon 1/16/23	Wed 1/25/23		
Knowledge Transfer	4 days	Mon 2/6/23	Thu 2/9/23		
Deployment	14 days	Wed 2/1/23	Tue 2/21/23		
Closing	3 days	Fri 2/24/23	Tue 2/28/23		
Confirm all deliverables signed off	1 day	Fri 2/24/23	Fri 2/24/23		David Sinclair
Schedule Lessons learned session	1 day	Fri 2/24/23	Fri 2/24/23		David Sinclair
Execute Lessons Learned Session	0 days	Fri 2/24/23	Fri 2/24/23		David Sinclair
Report on lessons learned from GTS	1 day	Mon 2/27/23	Mon 2/27/23		David Sinclair
DEO Final Acceptance	1 day	Tue 2/28/23	Tue 2/28/23		David Sinclair
INET 4.8 Upgrade	40 days	Mon 5/2/22	Sat 6/25/22		David Sinclair
SuccessKPI	82 days	Fri 8/26/22	Mon 12/19/22		David Sinclair
Genesys Chatbot	43 days	Mon 10/3/22	Fri 6/30/23		David Sinclair
Visual IVR	64 days	Tue 1/3/23	Fri 5/15/23		David Sinclair
Gather Requirements/workshops	7 days	Tue 1/3/23	Wed 1/11/23		David Sinclair
UAT Testing	10 days	Mon 3/27/23	Mon 4/17/23		Omar Cortes
Knowledge Transfer Session	1 day	Fri 4/22/23	Fri 5/12/23		Omar Cortes
Deliverable 32: Zappix Visual IVR	1 day	Fri 4/29/23	Fri 5/12/23		
GTS will submit invoice	1 day	Fri 5/5/23	Mon 5/15/23		David Sinclair
Payment Milestone	1 day	Fri 5/8/23	Mon 5/15/23		David Sinclair
TFS Migration	69 days	Fri 10/14/22	Wed 1/18/23		David Sinclair
NEW TFS Server Ready for install on Prem	1 day	Fri 10/14/22	Fri 10/14/22		Satish Pavuluri
Upgrade On Site TFS from 2015 to 2020 version	1 day	Mon 10/17/22	Mon 10/17/22		Satish Pavuluri
Test Upgraded system to confirm proper functionality	3 days	Mon 10/24/22	Wed 10/26/22		Satish Pavuluri
Install TFS on Cloud Servers	1 day	Tue 11/1/22	Tue 11/1/22		Satish Pavuluri
Migrate on Prem to Cloud Servers	1 day	Wed 1/18/23	Wed 1/18/23		Satish Pavuluri
ALM Migration	94 days	Mon 9/19/22	Thu 1/26/23		David Sinclair
Decision on ALM SAS or On Site	4 days	Tue 10/4/22	Fri 10/7/22		Quinton Lightfoot
Create new ALM server in the cloud	1 day	Mon 9/19/22	Mon 9/19/22		Ram Iyer
Configure new ALM Server	16 days	Tue 1/3/23	Tue 1/24/23		Ram Iyer
Test ALM In the cloud	3 days	Tue 1/24/23	Thu 1/26/23		Robina Brown

RMT UC4 Upgrade	47 days	Thu 10/6/22	Fri 12/9/22		David Sinclair
UAT Testing - Dev environment	45 days	Mon 7/18/22	Fri 9/16/22		David Sinclair
UAT Testing - UATTEST environment	17 days	Mon 9/12/22	Tue 10/4/22		David Sinclair
UAT Testing PreProd Environment	71.9 days	Tue 10/4/22	Wed 1/11/23		
UAT Testing SYSTEST	30.8 days	Mon 10/24/22	Tue 12/6/22		David Sinclair
UAT testing Hotfix	26.45 days	Mon 10/31/22	Tue 12/6/22		
Production environment pre-launch tasks	40.5 days	Mon 10/17/22	Mon 12/12/22		David Sinclair
Request Infrastructure Setup	1 day	Mon 10/17/22	Tue 10/18/22		Satish Pavuluri
Clone Blazon	10 days	Mon 10/31/22	Tue 11/15/22		Ram Iyer
Clone Crystal Reports	10 days	Mon 10/31/22	Tue 11/15/22		Ravi Mallapragada
Clone FileNet	3.4 days	Wed 11/2/22	Tue 11/8/22		Ram Iyer
Clone UC4 Batch Scheduler	3.4 days	Wed 11/2/22	Tue 11/8/22		Ravi Mallapragada
Clone OpenText Extreme	1 day	Mon 11/14/22	Mon 11/14/22		Ram Iyer
FileNet gap data copied	3 days	Thu 12/8/22	Mon 12/12/22		Sean Markland
UAT Testing - Production environment	29 days	Mon 12/12/22	Fri 1/20/23		David Sinclair
Interface Testing	21 days	Mon 12/12/22	Tue 1/10/23		Becky Leckinger
SMOKE Testing	15 days	Mon 12/12/22	Mon 1/2/23		Ken Mason
Test Blazon functionality	15 days	Mon 12/12/22	Fri 12/30/22		Andre Dixon
Test Crystal Reports functionality	10 days	Mon 12/19/22	Fri 12/30/22		Antonio Rosier
Test FileNet functionality	15 days	Mon 12/12/22	Fri 12/30/22		Sean Markland
Test UC4 Batch Scheduler	15 days	Mon 12/12/22	Fri 12/30/22		Antonio Rosier
Test OpenText Exstream	15 days	Mon 12/12/22	Fri 12/30/22		Nadia Miller
Load Testing	10 days	Tue 1/3/23	Tue 1/17/23		Harsha Vuppala
Production UAT completed	0 days	Fri 1/20/23	Fri 1/20/23		David Sinclair
UAT Testing - End User (Business Unit)	12 days	Mon 12/19/22	Tue 1/3/23		David Sinclair
Initial Claims workflow tested and approved	10 days	Mon 12/19/22	Fri 12/30/22		
Initial Testing	10 days	Mon 12/19/22	Fri 12/30/22		Antonio Rosier
Fix open issues	10 days	Mon 12/19/22	Fri 12/30/22		Rakesh Kavuri
Final testing and approval	0 days	Fri 12/30/22	Fri 12/30/22		Robin Hodge-Carey
Continued Claims workflow tested and approved	10 days	Mon 12/19/22	Fri 12/30/22		Robin Hodge-Carey
Initial Testing	10 days	Mon 12/19/22	Fri 12/30/22		Andre Dixon

Fix open issues	10 days	Mon 12/19/22	Fri 12/30/22		Rakesh Kavuri
Final testing and approval	0 days	Fri 12/30/22	Fri 12/30/22		Robin Hodge-Carey
Adjudication workflow tested and approved	10 days	Mon 12/19/22	Fri 12/30/22		Robin Hodge-Carey
Initial Testing	10 days	Mon 12/19/22	Fri 12/30/22		Antonio Rosier
Fix open issues	10 days	Mon 12/19/22	Fri 12/30/22		Rakesh Kavuri
Final testing and approval	0 days	Fri 12/30/22	Fri 12/30/22		Robin Hodge-Carey
Appeals workflow tested and approved	10 days	Mon 12/19/22	Fri 12/30/22		Robin Hodge-Carey
Initial Testing	10 days	Mon 12/19/22	Fri 12/30/22		Andre Dixon
Fix open issues	10 days	Mon 12/19/22	Fri 12/30/22		Rakesh Kavuri
Final testing and approval	0 days	Fri 12/30/22	Fri 12/30/22		Robin Hodge-Carey
Benefits changing workflow tested and approved	10 days	Mon 12/19/22	Fri 12/30/22		Robin Hodge-Carey
Initial Testing	10 days	Mon 12/19/22	Fri 12/30/22		Andrea Shand
Fix open issues	10 days	Mon 12/19/22	Fri 12/30/22		Rakesh Kavuri
Final testing and approval	0 days	Fri 12/30/22	Fri 12/30/22		Robin Hodge-Carey
Monetary workflow tested and approved	10 days	Mon 12/19/22	Fri 12/30/22		Robin Hodge-Carey
Initial Testing	10 days	Mon 12/19/22	Fri 12/30/22		Robin Hodge-Carey
Fix open issues	10 days	Mon 12/19/22	Fri 12/30/22		Rakesh Kavuri
Final testing and approval	0 days	Fri 12/30/22	Fri 12/30/22		Robin Hodge-Carey
WAGE workflow tested and approved	10 days	Mon 12/19/22	Fri 12/30/22		Robin Hodge-Carey
Initial Testing	10 days	Mon 12/19/22	Fri 12/30/22		Andre Dixon
Fix open issues	10 days	Mon 12/19/22	Fri 12/30/22		Rakesh Kavuri
Final testing and approval	0 days	Fri 12/30/22	Fri 12/30/22		Robin Hodge-Carey
Benefit Payment Control (BPC) workflow tested and approved	10 days	Mon 12/19/22	Fri 12/30/22		Robin Hodge-Carey
Initial testing	10 days	Mon 12/19/22	Fri 12/30/22		Andrea Shand
Fix open issues	10 days	Mon 12/19/22	Fri 12/30/22		Rakesh Kavuri
Final testing and approval	0 days	Fri 12/30/22	Fri 12/30/22		Robin Hodge-Carey
Employer/TPA Workflows tested and approved	10 days	Mon 12/19/22	Fri 12/30/22		Robin Hodge-Carey
Initial testing	10 days	Mon 12/19/22	Fri 12/30/22		Andre Dixon
Fix open issues	10 days	Mon 12/19/22	Fri 12/30/22		Rakesh Kavuri
Final testing and approval	0 days	Fri 12/30/22	Fri 12/30/22		Robin Hodge-Carey

Special Programs workflow tested and approved	10 days	Mon 12/19/22	Fri 12/30/22		Robin Hodge-Carey
Initial testing	10 days	Mon 12/19/22	Fri 12/30/22		Andrea Shand
Fix open issues	10 days	Mon 12/19/22	Fri 12/30/22		Rakesh Kavuri
Final testing and approval	0 days	Mon 12/19/22	Mon 12/19/22		David Sinclair
End-user UAT completed	12 days	Mon 12/19/22	Tue 1/3/23		David Sinclair
DR Testing	13 days	Tue 1/3/23	Thu 1/19/23		Viraj Jejurkar
Transition to Go Live	4 days	Mon 1/16/23	Thu 1/19/23		
Meet with C2C Support team to give orientation to new system	3 days	Mon 1/16/23	Wed 1/18/23		David Sinclair
Go through Alert Procedures with supporting team	2 days	Mon 1/16/23	Tue 1/17/23		David Sinclair
Ensure all product documentation is shared with team	1 day	Thu 1/19/23	Thu 1/19/23		David Sinclair
Training	1 day	Tue 1/17/23	Tue 1/17/23		
Admin Setup and Intro to new system	1 day	Tue 1/17/23	Tue 1/17/23		
Knowledge transfer session	1 day	Tue 1/17/23	Tue 1/17/23		Satish Pavuluri
Documentation of system Design	1 day	Tue 1/17/23	Tue 1/17/23		Ram Iyer
Documented System Maintenance Schedule	1 day	Tue 1/17/23	Tue 1/17/23		Roland Solvik
Alert Management using CAPM Tool	1 day	Tue 1/17/23	Tue 1/17/23		
Conduct Lessons Learned Meeting	2 days	Thu 1/19/23	Fri 1/20/23		David Sinclair
Schedule Lessons Learned meeting	1 day	Thu 1/19/23	Thu 1/19/23		David Sinclair
Conduct Lessons Learned meeting	1 day	Fri 1/20/23	Fri 1/20/23		David Sinclair
Record Lessons Learned	1 day	Fri 1/20/23	Fri 1/20/23		David Sinclair
Execution Phase complete	5 days	Mon 1/23/23	Fri 1/27/23		David Sinclair
Production Go Live	32 days	Thu 12/15/22	Sat 2/11/23		
Gap Data Copy to Prod for go live	1 day	Mon 1/23/23	Sat 2/11/23		Anand Kothandan
Copy FileNet Gap Data	28 days	Thu 12/15/22	Sat 2/11/23		Sean Markland
Cut over Go Live in Production	31.5 days	Thu 12/15/22	Sat 2/11/23		David Sinclair
02 - Cloud Application Performance Management: Go-live	0 days	Thu 12/15/22	Sat 2/11/23		
Monitoring and Controlling	220 days	Fri 2/25/22	Fri 12/30/22		
Manage Project Schedule	219 days	Fri 2/25/22	Wed 12/28/22		
Manage Project Costs	219 days	Fri 2/25/22	Wed 12/28/22		

Manage Project Scope	219 days	Fri 2/25/22	Wed 12/28/22		
Manage Project Risks	219 days	Fri 2/25/22	Wed 12/28/22		
Manage Project Issues	219 days	Fri 2/25/22	Wed 12/28/22		
Manage Decisions	219 days	Fri 2/25/22	Wed 12/28/22		
Manage Action Items	219 days	Fri 2/25/22	Wed 12/28/22		
Manage Cybersecurity	219 days	Fri 2/25/22	Wed 12/28/22		David Sinclair
Record Lessons Learned	219 days	Fri 2/25/22	Wed 12/28/22		David Sinclair
Prepare Regularly scheduled Status Reports	219 days	Fri 2/25/22	Sat 2/11/23		
Conduct Regularly scheduled Status Meetings	219 days	Fri 2/25/22	Sat 2/11/23		
Monitoring and Controlling Phase Complete	0 days	Fri 12/30/22	Sat 2/11/23		
Project Closeout	469 days	Tue 9/7/21	Fri 6/23/23		
Deliverable: Project Closeout Report	1 day	Fri 6/23/23	Fri 6/23/23		
Develop Project Closeout Report	1 day	Fri 2/24/23	Fri 2/24/23	666	
Review/Update Project Closeout Report	1 day	Fri 2/24/23	Fri 2/24/23	662	
Approve Project Closeout Report	1 day	Fri 2/24/23	Fri 2/24/23	663	
Project Closeout Report complete	0 days	Fri 2/24/23	Fri 2/24/23		
Schedule Project Closeout Meeting	1 day	Wed 1/4/23	Wed 1/4/23		
Conduct Knowledge Transfer	5 days	Fri 1/13/23	Thu 1/19/23		
Remove Commercial Cloud Web Servers	1 day	Fri 2/24/23	Fri 2/24/23		
Remove DB Servers and Databases	1 day	Fri 2/24/23	Fri 2/24/23		
Deconstruct hardware as needed	1 day	Fri 2/24/23	Fri 2/24/23		
Conduct Project Closeout meeting	1 day	Fri 2/24/23	Fri 2/24/23		
Closeout Phase complete	0 days	Fri 2/24/23	Fri 2/24/23		
Conduct Lessons Learned Meeting	2 days	Mon 2/13/23	Wed 2/15/23		
Conduct Lessons Learned meeting	1 day	Wed 2/15/23	Wed 2/15/23	676	
Record Lessons Learned	1 day	Wed 2/15/23	Wed 2/15/23	674	

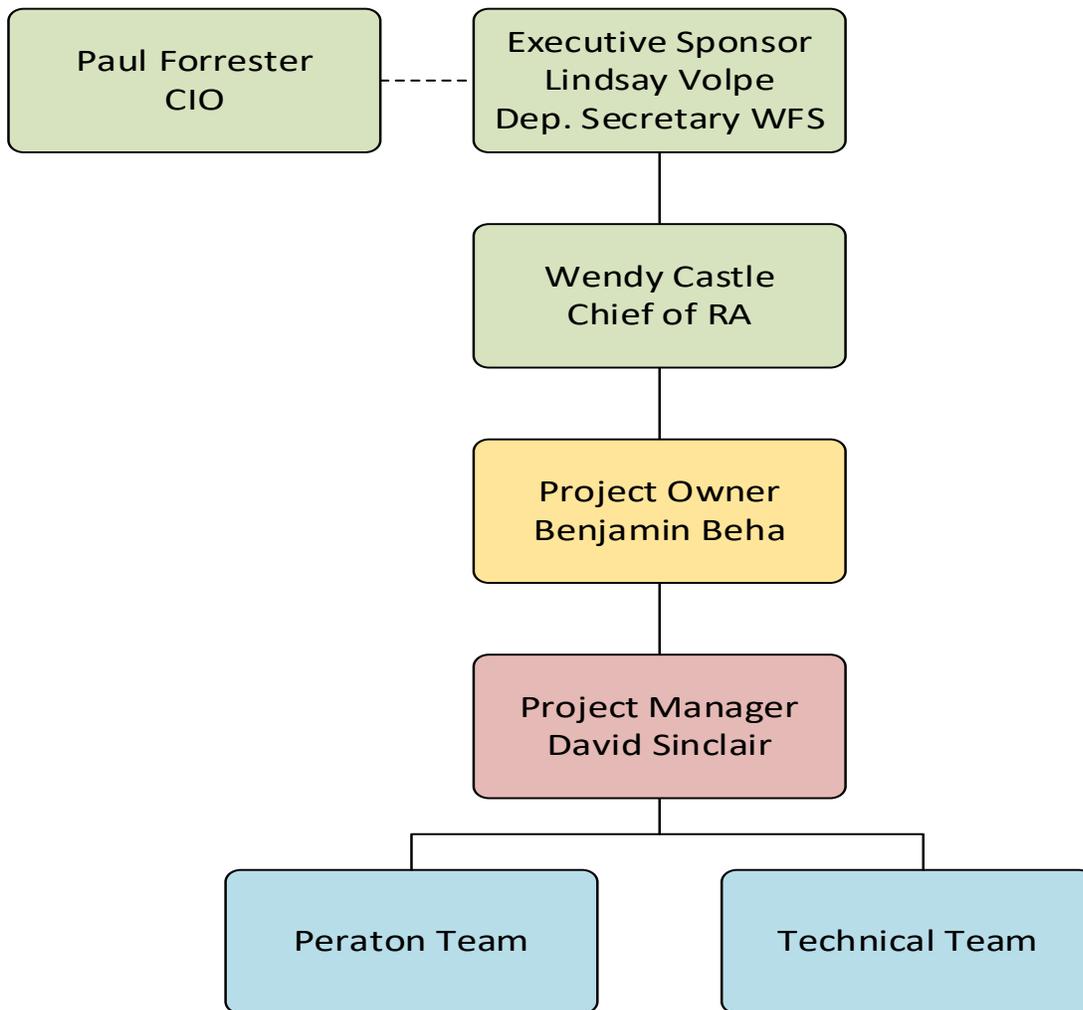
### III. Project Spending Plan

The Spend plan shows the reflection of Software that was used and professional services purchased for assistance in the project life cycle.

Cost Type	FY 2021 to 2022	FY 2022to 2023	Total Cost
Software	4,624,247.27	1,363,360.03	5,987,607.30
Other Opex	504,271.88	1,914,902.36	2,419,174.24

### IV. Project Organization and Methodology

#### A. Project Organizational Chart



#### B. Project Roles and Responsibilities

The Project Roles and Responsibilities reflects the higher-level Project Sponsors as well as members of the team doing the implementation and migration work of the solution.

Project Role	Resource Name	Responsibilities
<b>Executive Sponsor</b>	Lindsay Volpe	<ul style="list-style-type: none"> <li>• Provide guidance on overall strategic direction</li> <li>• Advise the Strategic Planning Office and project manager of risks that may impact the project</li> <li>• Facilitate resolution of significant issues in the project</li> <li>• Review and sign off on key milestones</li> </ul>
<b>CTO</b>	Domenic DiLullo	<ul style="list-style-type: none"> <li>• Provide guidance on overall strategic direction</li> <li>• Advise the Strategic Planning Office and project manager of risks that may impact the project</li> <li>• Facilitate resolution of significant issues in the project</li> <li>• Review and sign off on key milestones</li> </ul>
<b>Strategic Planning Office</b>	Beacon.Gov	<ul style="list-style-type: none"> <li>• Monitor project progress</li> <li>• Provide guidance and support to project manager and project team members</li> </ul>
<b>Project Manager</b>	David Sinclair	<ul style="list-style-type: none"> <li>• Manage all aspects of the project and ensure compliance with PMP</li> <li>• Monitor project progress and schedule adherence</li> <li>• Complete all documents related to the project</li> <li>• Identify and manage risks according to the PMP</li> </ul>
<b>Business Lead</b>	Wendy Castle	<ul style="list-style-type: none"> <li>• Review deliverables and project documents, identifying any deficiencies</li> <li>• Review and approve deliverables</li> <li>• Review and approve RFCs</li> </ul>
<b>Project Owner</b>	Benjamin Beha	<ul style="list-style-type: none"> <li>• Provide guidance on overall strategic direction</li> </ul>

Project Role	Resource Name	Responsibilities
<b>Functional Team</b>	Eddy Richards Ram Iyer Anand Kothandan Mannix Hawkins John Ramos Al Rehwinkel	<ul style="list-style-type: none"> <li>• Contribute subject matter expertise</li> <li>• Complete assigned project tasks in accordance with the Project Schedule</li> <li>• Identify risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP</li> <li>• Assist the Project Managers in responding to risks and issues</li> <li>• Assist the Project Manager in evaluating change requests</li> </ul>
<b>Technical Team</b>	Sushma Kavarthapu Vamsi Pasala Becky Leckinger Lewis Good David Zhang Robina Brown Jonathan Scott Brandon Grant Roland Solvik Mike George Sean Markland Joshua Lovestrand Ram Iyer Anand Kothandan	<ul style="list-style-type: none"> <li>• Contribute subject matter expertise</li> <li>• Complete assigned project tasks in accordance with the Project Schedule</li> <li>• Identify risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP</li> <li>• Assist the Project Managers in responding to risks and issues</li> <li>• Assist the Project Manager in evaluating change requests</li> </ul>
<b>Peraton</b>	Joe Lombardi	<ul style="list-style-type: none"> <li>• Integration testing is dependent on Connect to Cloud being live in the cloud.</li> </ul>

### C. Project Management Methodology

DEO will use the PMBOK project management methodology in compliance with the project management standard rule 60GG-2 F.A.C. Predictability, accountability, and flexibility are key elements that will be embraced by the overall project management approach to ensure DEO’s satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. DEO believes strong project management is critical throughout the life of any successful project.

For this project, DEO's project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from DEO within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the DEO Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.

DEO's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

DEO believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

## **V. Business Process Organizational Change Management Plan**

This project intends to improve the delivery, execution, security, or convenience of DEO's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Stakeholder identification and engagement plans
- Process identification and improvement plans
- Educational assessment and training plans
- Change risk assessment
- Change Advocate networks
- Change Management
- Business Relationship Management
- IT Service Management

## VI. Project Risk Management Plan

Risk management will be an ongoing process conducted throughout the project. The process begins with identifying and assessing significant risks, then developing an appropriate mitigation strategy to address the risk(s). It continues with regular risk monitoring, ongoing identification of new risks, and timely implementation of risk response plans.

The project's Risk Management Process, which is defined and maintained within the PMP, will address identified risks that may negatively impact the project and may require visibility by leadership.

The Risk Management Process involves:

- Identifying and categorizing project risks (Identify),
- Validating and logging the risk (Validate / Log) assessing and prioritizing the risks so they are manageable (Analyze),
- Developing a response strategy and assigning responsibility (Plan),
- Tracking the risks by reviewing them at key project milestones (Monitor/Track), and most importantly,
- Communicating the risks and strategies on an ongoing basis throughout the life of the project (Communicate).

The Risk Management Processes address internal risks - those under the control or influence of the project team, such as quality of deliverables, cost, schedule, or technical risks; as well as external risks - those outside the control of the project team such as governmental legislation.

The PM, along with the project team will validate any identified risk to make sure the information is complete, and the risk is not a duplicate. Once verified the risk information will be logged into the Risk Log and given a unique identifier.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
Hurricane impacting the state delays the schedule	Low	High	Adjust schedule accordingly	PM
Necessary tools, hardware, or materials need to be procured for the successful completion of the project.	Medium	Medium	Identify needs early on and involve management and budget staff throughout engagement	PM
Insufficient knowledge transfer of new process	Medium	Medium	Involve impacted staff throughout engagement to increase participation and knowledge of new processes	PM

## VII. Capacity Plan

This project does not involve the purchase/lease, configuration, and installation of significant computer hardware. For purposes of capacity planning, computer hardware includes servers, storage, and network infrastructure. Accordingly, a Capacity Plan is not required. Once the claim volume starts to go down as the claims volume decreases, capacity can be reduced. Also moving to an auto-scaling configuration will additionally reduce needed capacity.



# **OPERATIONAL WORK PLAN FOR RULES ENGINE**

**FLORIDA DEPARTMENT OF ECONOMIC OPPORTUNITY  
DIVISION OF INFORMATION TECHNOLOGY  
AND  
DIVISION OF WORKFORCE SERVICES**

**FISCAL YEAR 2022-2023**

**QUARTER 4**

**PREPARED ON MAY 2, 2023**

**TABLE OF CONTENTS**

**SECTION 1 — OVERALL PROJECT PLAN ..... 3**

**I. PROJECT CHARTER..... 3**

A. SCOPE STATEMENT ..... 3

B. PROJECT OBJECTIVES AND BUSINESS BENEFITS ..... 3

C. CRITICAL SUCCESS FACTORS ..... 4

D. KEY DATES ..... 4

E. MAJOR DELIVERABLES ..... 4

F. MAJOR MILESTONES ..... 5

G. KEY STAKEHOLDERS..... 5

H. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS ..... 5

**II. WORK BREAKDOWN STRUCTURE..... 5**

**III. RESOURCE LOADED PROJECT SCHEDULE ..... 7**

**IV. PROJECT SPENDING PLAN ..... 8**

**V. PROJECT ORGANIZATION AND METHODOLOGY..... 9**

A. PROJECT ORGANIZATIONAL CHART ..... 9

B. PROJECT ROLES AND RESPONSIBILITIES ..... 9

C. PROJECT MANAGEMENT METHODOLOGY ..... 12

**VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN..... 13**

**VII. PROJECT RISK MANAGEMENT PLAN ..... 13**

**VIII. CAPACITY PLAN..... 14**

## SECTION 1 — OVERALL PROJECT PLAN

### I. *Project Charter*

As a part of the Florida Department of Economic Opportunity’s (DEO) Reemployment Assistance (RA) Modernization Program, a Rules Engine product will be procured and a Business Rules Catalog will document the RA Claims and Benefits Information System (System) rules in one location, for ease of tracking, reviewing, and capturing information. The Rules Engine project will allow DEO to move System business rules into a user-visible and user-maintainable business rules engine. This will allow both maintaining and developing business rules without requiring code changes and subsequent deployments.

#### A. **Scope Statement**

The Rules Engine Project will prepare DEO to move System business rules into a user-visible and user-maintainable Business Rules Engine. This project will identify and document System rules to develop a Business Rules Catalog and procure a Rules Engine product.

##### **In Scope**

- Procure a business rules engine product.
- Create a Business Rules Catalog to incorporate all business rules that govern the Reemployment Assistance program within the System, excluding CX/UX business rules.
  - Include complexity of each business rule, as low, medium, or high.
  - Include the type of rule and number of System users impacted by rule, if applicable.
  - Order rules by frequency of change, from highest to lowest.
  - Maintain the catalog within the Central Repository.

##### **Out of Scope**

- Migrate rules into a business rules engine.
- Perform regression testing.
- Utilize the rules engine for modernization efforts.
- Identify CX/UX business rules.
- Complete documentation for technical debt for remaining rules.

#### B. **Project Objectives and Business Benefits**

The Rules Engine project was developed to successfully procure a Business Rules Engine. Along with the procurement of the tool, the project will create a Business Rules Catalog, which captures business rules within the System.

Project Objective	Business Benefit
DEO will have a modular foundation that enables continuous modernization.	<ul style="list-style-type: none"> <li>• A business rules engine will be installed, configured, and tested.</li> </ul>

Project Objective	Business Benefit
Inventory business rules.	<ul style="list-style-type: none"> <li>DEO will be able to validate suitability of business rules for a business rules engine.</li> </ul>

### C. Critical Success Factors

- Timely and high-quality achievement of major milestones/deliverables.
- Ability for future modernization efforts to utilize the business rules engine for continuous modernization efforts.

### D. Key Dates

Key Date	Importance and Relevance to the Project
April 2022	Contract executed with Peraton for System and Software Integration (SSI) services
June 2022	Identification and prioritization of business systems rules
November 2022	Procurement for business rules engine advertised
February 10, 2023	Contract Awarded and announced
February 10 – March 2023	Vendor Onboarded
June 30, 2023	Closeout Phase complete; project complete

### E. Major Deliverables

Major Deliverable	Deliverable Description
Project Kickoff Meeting	RE project kickoff meeting defining project scope and identifying internal project team.
Project Charter	Complete and submit a detailed project charter to DEO.
Project Management Plan	The vendor provides the final version of the PMP after review and approval by DEO.
Weekly Status Meetings	Host weekly status meetings with project team.
Identification of Business Rules	Project team identifies business system rules for implementation into the business rules engine. Remaining rules will be addressed as a part of continuous modernization.
Procurement of Business Rules Engine	Procurement of a business rules engine product.
Business Rules Catalog	The project team shall create a Business Rules Catalog to incorporate all business rules maintained within the System.
Transition Plan	As part of the transition into continuous improvement, the project team shall deliver the Transition Plan after review and approval by DEO.
Project Closeout Report	The vendor provides the Project Closeout Report after review and approval by DEO.

## F. Major Milestones

Major Milestone	Milestone Description
Procurement of Business Rules Engine	Procure Business Rules Engine product to use for business systems rules
Identification and prioritization of business systems rules	Identify and prioritize business systems rules to documented within the Business Rules Catalog.
Creation of Business Rules Catalog	System rules will be reviewed and documented to develop a Business Rules Catalog.
Project Closeout Report	The vendor provides the Project Closeout Report after review and approval by DEO.

## G. Key Stakeholders

Key Stakeholder	Project Interest
Meredith Ivey	Acting Secretary, Department of Economic Opportunity
Lindsay Volpe	Deputy Secretary, Workforce Services
Domenic DiLullo	Chief Technology Officer
Paul Forrester	Chief Information Officer, Program Owner- Information Technology
Allyce Moriak	Chief Financial Officer
Wendy Castle	RA Modernization Program Owner – Business
Nicole Sanislow	RA Modernization Program Manager – Business
Tom Richardson	RA Modernization Lead Program Manager – Strategic Planning Office
Thomas Holliday	RA Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	RA Modernization Program Manager – Information Technology
TBD	Project Owner
Nicole Cain	Project Manager

## H. Significant Project Assumptions and Constraints

### Project Assumptions

1. System documentation detailing current business rules are readily available and accessible.
2. Technical support and Subject Matter Expert resources will be available as needed, to support the project as needed.

### Project Constraints

1. Limited time and capacity of individuals assigned to assist.

## II. Work Breakdown Structure

WBS	Task Name
<b>1</b>	<b>Rules Engine</b>

<b>1.1</b>	<b>Initiation</b>
<b>1.1.1</b>	<b>Risk and Complexity Assessment</b>
<b>1.1.2</b>	<b>Deliverable: Project Charter</b>
1.1.3	Project Charter complete
<b>1.1.4</b>	<b>Project Kickoff Meeting</b>
1.1.5	Initiation Phase complete
<b>1.2</b>	<b>Planning</b>
<b>1.2.1</b>	<b>Deliverable: Resource Plan</b>
1.2.2	Resource Plan Complete
<b>1.2.3</b>	<b>Deliverable: Project Schedule</b>
1.2.4	Project Schedule complete
<b>1.2.5</b>	<b>Deliverable: Project Management Plan</b>
1.2.6	Project Management Plan complete
<b>1.2.7</b>	<b>Deliverable: Project Budget</b>
1.2.8	Project Budget complete
<b>1.2.9</b>	<b>Deliverable: Project Spending Plan</b>
1.2.10	Project Spending Plan complete
<b>1.2.11</b>	<b>Determine Subsets of Rules</b>
1.2.12	Planning Phase Complete
<b>1.2.13</b>	<b>Requirements:</b>
<b>1.2.13.1</b>	<b>Gather initial requirements</b>
<b>1.2.13.2</b>	<b>Deliverable: Requirements Traceability Matrix</b>
1.2.13.3	Complete the Planning Gate R&C Assessment
<b>1.2.13.4</b>	<b>Conduct Lessons Learned Meeting</b>
<b>1.3</b>	<b>Execution</b>
<b>1.3.1</b>	<b>Document Rules</b>
<b>1.3.2</b>	<b>Test Plan</b>
<b>1.3.3</b>	<b>Procurement of Rules Engine</b>
<b>1.3.4</b>	<b>Initiate Change in Scope</b>
<b>1.3.5</b>	<b>Develop Rule Catalog</b>
<b>1.3.5.1</b>	<b>Claims</b>
<b>1.3.5.2</b>	<b>Appeals</b>
<b>1.3.5.3</b>	<b>Adjudication &amp; Benefit Charging</b>
<b>1.3.5.4</b>	<b>Global</b>
<b>1.3.5.5</b>	<b>FIRRE</b>
<b>1.3.5.6</b>	<b>External Partners</b>
<b>1.3.5.7</b>	<b>Employer Portal Sides &amp; Correspondence</b>
<b>1.3.5.8</b>	<b>Employer Benefit Charging &amp; Protest</b>
<b>1.3.5.9</b>	<b>IVR</b>
<b>1.3.5.10</b>	<b>Misc - No Use Case</b>
<b>1.3.5.11</b>	<b>Overpayments Recovery Wage Audit</b>
<b>1.3.5.12</b>	<b>Program Integrity and Federal Reports</b>
<b>1.3.5.13</b>	<b>RAAC</b>
<b>1.3.5.14</b>	<b>Special Programs Payments Wage</b>

1.3.5.15	TOP
1.3.5.16	Audit and Review
1.3.5.17	Finalize & Approve Catalog
1.3.6	Conduct Lessons Learned Meeting
1.4	Execution Phase complete
1.5	Monitoring and Controlling
1.6	Project Closeout
1.6.1	Schedule Project Closeout Meeting
1.6.2	Deliverable: Project Closeout Report
1.6.3	Project Closeout Report complete
1.6.4	Conduct Knowledge Transfer
1.6.5	Conduct Project Closeout meeting
1.6.6	Conduct Lessons Learned Meeting
1.6.7	Closeout Phase complete

### III. Resource Loaded Project Schedule

WBS	Task Mode	Task Name	% Compl	Duration	Start	Finish	Actual Finish	Predecessors	Resource Names
1		Rules Engine	61%	402 days?	Mon 12/6/21	Fri 6/30/23	NA		
1.1		Initiation	100%	22 days?	Wed 1/5/22	Fri 2/4/22	Fri 2/4/22		
1.1.1		Risk and Complexity Assessment	100%	2 days?	Wed 1/5/22	Thu 1/6/22	Thu 1/6/22		
1.1.2		Deliverable: Project Charter	100%	3 days?	Thu 1/27/22	Tue 2/1/22	Tue 2/1/22		
1.1.3		Project Charter complete	100%	0 days	Tue 2/1/22	Tue 2/1/22	Tue 2/1/22 9		
1.1.4		Project Kickoff Meeting	100%	5 days?	Fri 1/28/22	Thu 2/3/22	Thu 2/3/22		
1.1.5		Initiation Phase complete	100%	1 day	Fri 2/4/22	Fri 2/4/22	Fri 2/4/22		
1.2		Planning	100%	145 days?	Mon 12/6/21	Wed 6/29/22	Wed 6/29/22 15		
1.2.1		Deliverable: Resource Plan	100%	6 days	Mon 2/7/22	Mon 2/14/22	Mon 2/14/22 15		
1.2.2		Resource Plan Complete	100%	0 days	Mon 2/14/22	Mon 2/14/22	Mon 2/14/22 20		
1.2.3		Deliverable: Project Schedule	100%	18 days?	Fri 2/11/22	Tue 3/8/22	Tue 3/8/22		
1.2.4		Project Schedule complete	100%	0 days	Tue 3/8/22	Tue 3/8/22	Tue 3/8/22 26		
1.2.5		Deliverable: Project Management Plan	100%	4 days?	Wed 3/9/22	Mon 3/14/22	Mon 3/14/22		
1.2.6		Project Management Plan complete	100%	0 days	Mon 3/14/22	Mon 3/14/22	Mon 3/14/22 31		
1.2.7		Deliverable: Project Budget	100%	3 days?	Tue 3/15/22	Thu 3/17/22	Thu 3/17/22		
1.2.8		Project Budget complete	100%	0 days	Thu 3/17/22	Thu 3/17/22	Thu 3/17/22 36		
1.2.9		Deliverable: Project Spending Plan	100%	5 days?	Tue 3/15/22	Mon 3/21/22	Mon 3/21/22		
1.2.10		Project Spending Plan complete	100%	0 days	Mon 3/21/22	Mon 3/21/22	Mon 3/21/22 41		
1.2.11		Determine Subsets of Rules	100%	4 days	Tue 4/26/22	Fri 4/29/22	Fri 4/29/22		
1.2.12		Planning Phase Complete	100%	1 day	Fri 4/29/22	Fri 4/29/22	Fri 4/29/22 46FF		
1.2.13		Requirements:	100%	145 days?	Mon 12/6/21	Wed 6/29/22	Wed 6/29/22		
1.2.13.1		Gather initial requirements	100%	44 days?	Tue 3/22/22	Fri 5/20/22	Fri 5/20/22		
1.2.13.2		Deliverable: Requirements Traceability Matrix	100%	40 days?	Tue 5/3/22	Tue 6/28/22	Tue 6/28/22		
1.2.13.3		Complete the Planning Gate R&C Assessment	100%	1 day?	Wed 6/29/22	Wed 6/29/22	Wed 6/29/22		Nicole Cain,Alvin Sellars,Benjamin Beha
1.2.13.4		Conduct Lessons Learned Meeting	100%	83 days?	Mon 12/6/21	Fri 4/1/22	Fri 4/1/22		
1.3		Execution	74%	318 days?	Mon 4/4/22	Thu 6/29/23	NA 69		
1.3.1		Document Rules	100%	6 days?	Wed 4/6/22	Wed 4/13/22	Wed 4/13/22		
1.3.2		Test Plan	100%	76 days?	Wed 6/29/22	Fri 10/14/22	Fri 10/14/22		
1.3.3		Procurement of Rules Engine & Vendor Services	100%	216 days?	Mon 4/4/22	Fri 2/10/23	Fri 2/10/23		
1.3.4		Initiate Change in Scope	95%	37 days	Mon 2/13/23	Thu 3/30/23	NA		
1.3.5		Develop Rule Catalog	22%	63 days	Tue 4/4/23	Thu 6/29/23	NA		
1.3.5.1		Claims	48%	14 days	Tue 4/4/23	Fri 4/21/23	NA		
1.3.5.2		Appeals	39%	14 days	Fri 4/7/23	Wed 4/26/23	NA		
1.3.5.3		Adjudication & Benefit Charging	50%	14 days	Wed 4/12/23	Sun 4/30/23	NA		

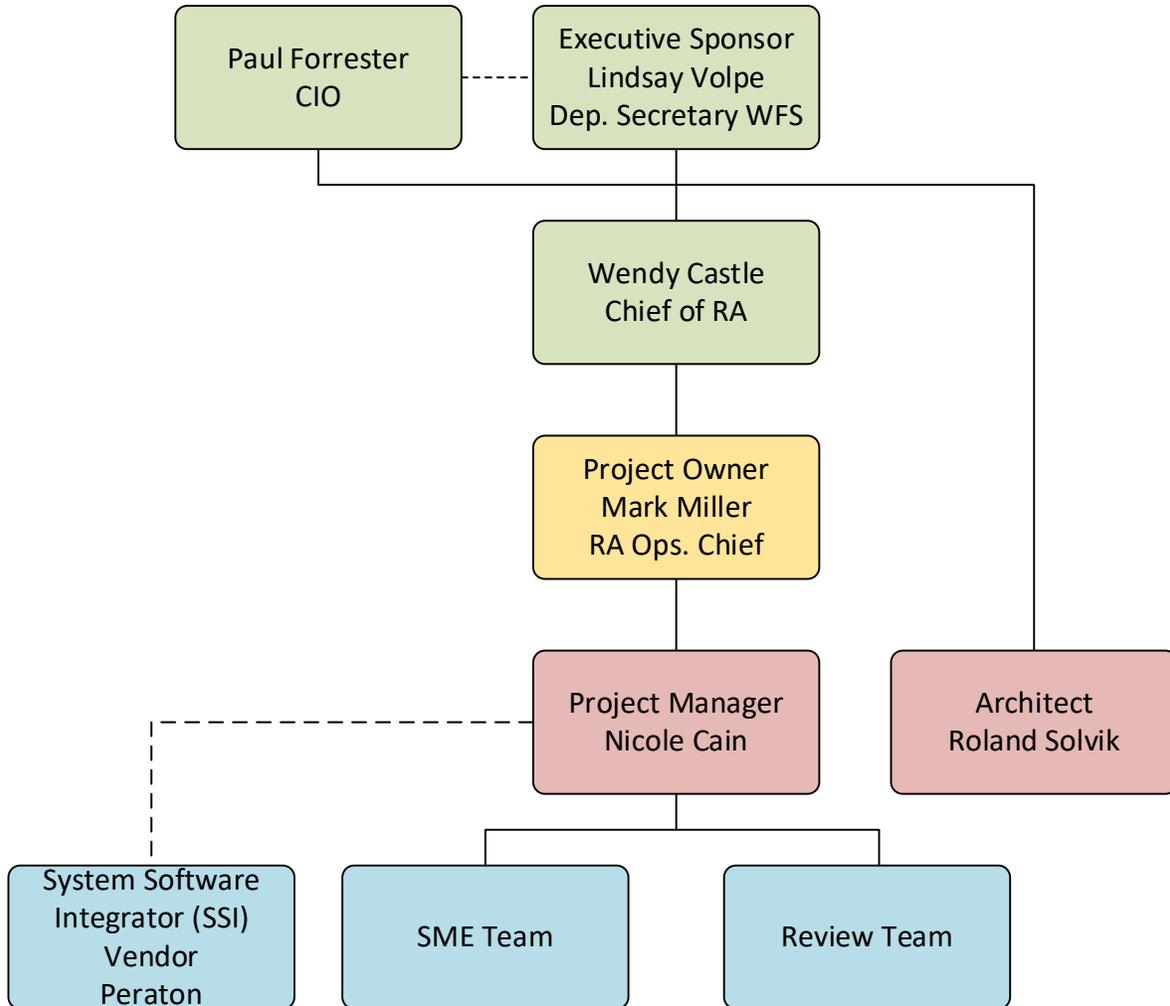
WBS	Task Mode	Task Name	% Compt	Duration	Start	Finish	Actual Finish	Predecessors	Resource Names
1.3.5.4		Global	32%	14 days	Mon 4/17/23	Wed 5/3/23		NA	
1.3.5.5		FIRRE	32%	14 days	Thu 4/20/23	Mon 5/8/23		NA	
1.3.5.6		External Partners	0%	14 days	Tue 4/25/23	Thu 5/11/23		NA	
1.3.5.7		Employer Portal Sides & Correspondence	21%	14 days	Fri 4/28/23	Tue 5/16/23		NA	
1.3.5.8		Employer Benefit Charging & Protest	43%	14 days	Tue 5/2/23	Fri 5/19/23		NA	
1.3.5.9		IVR	0%	14 days	Fri 5/5/23	Wed 5/24/23		NA	
1.3.5.10		Misc - No Use Case	32%	14 days	Wed 5/10/23	Tue 5/30/23		NA	
1.3.5.11		Overpayments Recovery Wage Audit	38%	16 days	Mon 5/15/23	Tue 6/6/23		NA	
1.3.5.12		Program Integrity and Federal Reports	0%	14 days	Thu 5/18/23	Wed 6/7/23		NA	
1.3.5.13		RAAC	0%	14 days	Tue 5/23/23	Mon 6/12/23		NA	
1.3.5.14		Special Programs Payments Wage	11%	14 days	Fri 5/26/23	Thu 6/15/23		NA	
1.3.5.15		TOP	0%	14 days	Thu 6/1/23	Tue 6/20/23		NA	
1.3.5.16		Audit and Review	0%	7 days	Mon 6/19/23	Tue 6/27/23		NA	
1.3.5.17		Finalize/Approve Rules	0%	2 days	Wed 6/28/23	Thu 6/29/23		NA 206	
1.3.6		Conduct Lessons Learned Meeting	0%	8 days	Tue 6/6/23	Thu 6/15/23		NA	
1.4		Execution Phase complete	0%	1 day	Thu 6/29/23	Thu 6/29/23		NA 207FF	
1.5		Monitoring and Controlling	59%	388 days?	Wed 12/22/21	Wed 6/28/23		NA	
1.6		Project Closeout	0%	10 days	Mon 6/19/23	Fri 6/30/23		NA	
1.6.1		Schedule Project Closeout Meeting	0%	1 day	Mon 6/19/23	Mon 6/19/23		NA	
1.6.2		Deliverable: Project Closeout Report	0%	6 days	Tue 6/20/23	Tue 6/27/23		NA	
1.6.2.1		Develop Project Closeout Report	0%	2 days	Tue 6/20/23	Wed 6/21/23		NA 228	Nicole Cain
1.6.2.2		Review/Update Closeout Report	0%	2 days	Thu 6/22/23	Fri 6/23/23		NA 230	Nicole Cain,Rollie Solvik
1.6.2.3		Approve Project Closeout Report	0%	2 days	Mon 6/26/23	Tue 6/27/23		NA 231	Garrick Wright,Nicole Cain,Nicole Sanislow,TH
1.6.3		Project Closeout Report complete	0%	0 days	Tue 6/27/23	Tue 6/27/23		NA 233	
1.6.4		Conduct Knowledge Transfer	0%	1 day	Wed 6/28/23	Wed 6/28/23		NA 233	Nicole Cain
1.6.5		Conduct Project Closeout meeting	0%	1 day	Thu 6/29/23	Thu 6/29/23		NA 235	Nicole Cain
1.6.6		Conduct Lessons Learned Meeting	0%	10 days	Mon 6/19/23	Fri 6/30/23		NA	
1.6.6.1		Schedule Lessons Learned meeting	0%	1 day	Mon 6/19/23	Mon 6/19/23		NA 228SS	Nicole Cain
1.6.6.2		Conduct Lessons Learned meeting	0%	1 day	Thu 6/29/23	Thu 6/29/23		NA 236SS	Nicole Cain
1.6.6.3		Record Lessons Learned	0%	2 days	Thu 6/29/23	Fri 6/30/23		NA 239SS	Nicole Cain
1.6.7		Closeout Phase complete	0%	0 days	Fri 6/30/23	Fri 6/30/23		NA 240	

**IV. Project Spending Plan**

FY 2021-22 Expenditures	FY 2022-23 Expenditures
Software: \$0.00	Software: \$0.00
Other OpEx (Vendor Deliverables): \$0.00	Other OpEx (Vendor Deliverables): \$0.00
Other CapEx: \$0.00	Other CapEx: 0.00

**V. Project Organization and Methodology**

**A. Project Organizational Chart**



**B. Project Roles and Responsibilities**

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> <li>Provide guidance on overall strategic direction</li> <li>Advising the Strategic Planning Office and project manager of risks that may impact the project</li> <li>Facilitate resolution of significant issues in the project</li> <li>Reviewing and signing off on key milestones</li> </ul>

Name	Project Role	Responsibility
Domenic DiLullo	CTO	<ul style="list-style-type: none"> <li>• Provide guidance on overall strategic direction</li> <li>• Advising the Strategic Planning Office and project manager of risks that may impact the project</li> <li>• Facilitate resolution of significant issues in the project</li> <li>• Reviewing and signing off on key milestones</li> </ul>
Wendy Castle	Chief of RA Program Owner	<ul style="list-style-type: none"> <li>• Provide guidance on overall strategic direction</li> <li>• Advising the Strategic Planning Office and project manager of risks that may impact the project</li> <li>• Facilitate resolution of significant issues in the project</li> <li>• Reviewing and signing off on key milestones</li> </ul>
Paul Forrester	CIO Program Owner	<ul style="list-style-type: none"> <li>• Responsible for the Strategy of DEO IT</li> <li>• Responsible for Staffing and Support plans</li> <li>• Responsible for day-to-day operations</li> <li>• Responsible for working closely with programs on technology needs</li> </ul>
TBD	Project Owner/Director of Reemployment Assistance Operations	<ul style="list-style-type: none"> <li>• Contributes subject matter expertise</li> <li>• Assists the Project Managers in responding to risks and issues</li> <li>• Assists the Project Manager in evaluating change requests</li> <li>• Reviews deliverables and project documents, identifying any deficiencies</li> <li>• Reviews and approves deliverables</li> </ul>
Nicole Cain	Project Manager	<ul style="list-style-type: none"> <li>• Manages all aspects of the project and ensure compliance with project plan</li> <li>• Monitors project progress and schedule adherence</li> <li>• Completes all documents related to the project</li> <li>• Identifies and manages risks according to the project plan</li> </ul>
Roland Solvik	Architect and Technical Lead	<ul style="list-style-type: none"> <li>• Responsible for assisting the team in finding solutions to issues elevated to him</li> <li>• Is available to project sponsors for technical questions regarding direction of the project</li> </ul>

Name	Project Role	Responsibility
		and any dependencies/impacts of other projects <ul style="list-style-type: none"> <li>• Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team.</li> </ul>
SME Team	Subject Matter Expert(s)	<ul style="list-style-type: none"> <li>• Process development tasks</li> <li>• Contributes subject matter expertise</li> <li>• Complete assigned project tasks in accordance with the Project Schedule</li> <li>• Identifies risks and issues to the Project Manager in accordance with the Risk and Issue Management section of the PMP</li> <li>• Assists the Project Manager in responding to risks and issues</li> <li>• Assists the Project Manager in evaluating change requests</li> </ul>
Technical Team	Technical Support	<ul style="list-style-type: none"> <li>• Process development tasks</li> <li>• Contributes technical expertise</li> <li>• Complete assigned project tasks in accordance with the Project Schedule</li> <li>• Identifies risks and issues to the Project Manager in accordance with the Risk and Issue Management section of the PMP</li> <li>• Assists the Project Manager in responding to risks and issues</li> <li>• Assists the Project Manager is evaluating change requests</li> </ul>
Review Team	Documentation Reviewers	<ul style="list-style-type: none"> <li>• Reviews documentation when submitted by Vendor</li> <li>• Contributes subject matter expertise</li> <li>• Completes assigned project tasks in accordance with the Project Schedule</li> <li>• Identifies risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP</li> <li>• Assists the Project Managers in responding to risks and issues</li> <li>• Assists the Project Manager in evaluating change requests</li> </ul>
Vendor	Strategic Planning Office (SPO)	<ul style="list-style-type: none"> <li>• Monitors project progress</li> <li>• Facilitates DEO Leadership Team Governance meetings</li> </ul>

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> <li>Provides guidance and support to project manager and project team members</li> </ul>
Vendor	SSI	<ul style="list-style-type: none"> <li>Provide recommendations for technology selections for Rules Engine project procurement</li> <li>Assist with drafting the scope of work and deliverables for the Rules Engine product procurement and vendor services</li> <li>Assist in evaluating vendor response for the procurement of the rules Engine product</li> </ul>
Vendor	TCS	<ul style="list-style-type: none"> <li>Provide services in accordance to the Scope of Work to deliver and support a Rules Engine product</li> </ul>

### C. Project Management Methodology

DEO will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure DEO’s satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. DEO believes strong project management is critical throughout the life of any successful project.

For this project, DEO’s project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from DEO within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the DEO Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- DEO’s project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone’s role in the project, and clear delineation of responsibilities.

DEO believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones

- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

## ***VI. Business Process Organizational Change Management Plan***

This project intends to improve the delivery, execution, security, or convenience of DEO's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Program-wide Organizational Change Management Plan
- Organizational Change Readiness Assessment
- Change Impact Analysis
- Communications Plan
- Change Champion Network
- Training Plan
- Change Management Metrics
- Post-implementation Support Plan

## ***VII. Project Risk Management Plan***

This project will follow the [Risk Management Plan](#), captured within the Reemployment Assistance Program Management Plan. The Reemployment Assistance Modernization Program team follows a standard method for logging and categorizing issues, researching solutions, and communicating options and final recommendations. Project team members should actively contribute, as it is critical to timely decisions and moving past roadblocks. The buy-in of the project team, key team members and technical staff is critical to the success and ensures that the project team delivers a product in line with the project goals.

Key activities of the risk management process include:

- **Risk Identification** – Identifying risks that could potentially impact the project.
- **Risk Analysis** – Prioritize risks and assess the probability and consequence of the risk.
- **Risk Response Planning** – Prepare action plans to enhance opportunities or minimize threats to the program.
- **Risk Monitoring** – Execute action plans and evaluate their effectiveness, tracking, and reviewing residual risks and identifying new risks.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
If the Rules Engine project continues to be delayed because of no firm identification and finalization of business rules to be migrated, this could take considerable effort that could potentially push the project schedule out further.	Medium	Medium	Work with business unit, architects, and project team to quickly implement within the scope of the project.	Nicole Cain
The Technical Change Control Committee (TCCC) are currently working on other priorities. If they are not readily available to assist with the determination of complexity of business rules, it could potentially delay the completion of the Rules Catalog.	Medium	Medium	The Rules Engine project team will decrease the risk by providing rules to the TCCC as quickly as possible. Rules Catalog will be maintained from one central location, allowing all to work at the same time.	Nicole Cain

### VIII. Capacity Plan

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

#### Project Capacity Planning

- Establish Cross-Functional Team: To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- Calculate Resource Capacity: Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- Determine Resource Requirements: For each project, look at the scope and what resources are required to do the task for the project.
- Project Prioritization: Via a weighted scoring model used for RA Mod, projects within the program have been prioritized for the purpose of optimizing resources and time.
- Allocate Resources Based on Project Priority: Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- Keep the Lines of Communications Open: Communicate between executives, project management leaders and stakeholders.

- Document Known Risks: Monitor risks such as union strikes, weather, government regulations that stop a project or create new ones unexpectedly.
- Plan for How to Handle Not enough Capacity: Understand that obtaining new needed resources takes time and advance planning is imperative.



# **OPERATIONAL WORK PLAN FOR SOA AND API LAYER**

**FLORIDA DEPARTMENT OF ECONOMIC DIVISION OF  
INFORMATION TECHNOLOGY  
AND  
DIVISION OF WORKFORCE SERVICES**

**FISCAL YEAR 2022-2023  
QUARTER 4**

**PREPARED ON: 04/30/23**

**TABLE OF CONTENTS**

**SECTION 1 — OVERALL PROJECT PLAN ..... 3**

**I. PROJECT CHARTER\* ..... 3**

A. SCOPE STATEMENT ..... 3

B. PROJECT OBJECTIVES AND BUSINESS BENEFITS ..... 5

C. CRITICAL SUCCESS FACTORS ..... 6

D. KEY DATES\* ..... 6

E. MAJOR DELIVERABLES\* ..... 6

F. MAJOR MILESTONES\* ..... 7

G. KEY STAKEHOLDERS ..... 8

H. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS ..... 8

**II. WORK BREAKDOWN STRUCTURE ..... 10**

A. WORK BREAKDOWN STRUCTURE\* ..... 10

B. WORK BREAKDOWN STRUCTURE DATA DICTIONARY ..... 11

**III. RESOURCE LOADED PROJECT SCHEDULE\* ..... 13**

**IV. PROJECT SPENDING PLAN ..... 15**

**V. PROJECT ORGANIZATION AND METHODOLOGY ..... 15**

A. PROJECT ORGANIZATIONAL CHART ..... 16

B. PROJECT ROLES AND RESPONSIBILITIES ..... 17

C. PROJECT MANAGEMENT METHODOLOGY ..... 19

**VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN ..... 19**

**VII. PROJECT RISK MANAGEMENT PLAN ..... 20**

**VIII. CAPACITY PLAN ..... 20**

## SECTION 1 – OVERALL PROJECT PLAN

### I. *Project Charter\**

The Department of Economic Opportunity’s (DEO) current Application Program Interface (API) management approach for the Connect system is based on technology that was deployed in 2010. As a result, the Reemployment Assistance Claims and Benefits Information System (System) Modernization Program Roadmap indicates a need for a comprehensive review and update of the API deployment and governance approach to the System.

The purpose of this project is to address the foundation (architectural basis) needed for API development and process improvements for API governance to the System. The resulting intent of the project is to provide foundational support (a solid architectural basis) for applications that utilize open-standard, service-oriented architecture (SOA) designs, as well as APIs, to enable timely implementation of business driven, user-experience (UX) focused services.

As background, a service in an SOA, according to MuleSoft, “is a self-contained unit of software that performs a specific task. It has three components: an interface, a contract, and implementation. The interface defines how a service provider will perform requests from a service consumer, the contract defines how the service provider and the service consumer should interact, and the implementation is the actual service code itself. ...”

MuleSoft goes on to state, “...in a service-oriented architecture, services can be combined with other available services in a network through service orchestration to create higher-level composite services and applications. A service is reusable, non-context specific, stateless, and can be dynamically discovered across the enterprise, in partner systems, or in the cloud. These characteristics enable services to be loosely coupled, resulting in new applications that are designed according to SOA principles.”

Real world outcomes of establishing a services-oriented architecture using APIs are discussed below in section B “Project Objectives and Business Benefits.”

\* This is the final OWP report for the SOA and API Layer project. The project close report has been written and signed off by the project manager and project owner.

#### A. **Scope Statement**

As a part of the Reemployment Assistance (RA) Modernization Program, the SOA and API Layer project will establish a solid architectural basis in support of the continuous modernization by defining a new architectural basis for a service-oriented architecture (SOA) for the modernized System. The SOA and API layer project will deliver improved scalability due to the service-oriented architecture allowing independent scaling of each service.

In accordance with the ISF report, the key major activities associated with this project that remain in-scope as of this writing, include:

1. Prepare an inventory of desired services based on the existing API capabilities

2. Identify any other architectural requirements such as Enterprise Service Bus or API Gateway usage
3. Document the resulting architectural standard for enforcement during the CX/UX modernization

### **In Scope\*\*\*\***

The following elements are in-scope, meaning that they are expected to be performed during the project timeframe.

#### **Project Phase 1A – Adopting New Technology\*\*\***

- Procure an application programming interface (API) layer product
- Secure technology dependent resources (SOA/API vendor)

#### **Project Phase 1A – Implementation\*\***

- Develop user stories and a test plan for selected APIs\*
- Document lessons learned

\*The selection process for APIs to migrate for purposes of the selected APIs involves:

- generating a list of all APIs
- separating APIs into real-time vs. batch
- selecting specific APIs within the real time subset based on:
  - Frequency of use
  - APIs called early in the claims process
  - Conversion of one API from each protocol type (REST/SOAP)
- per DCSN0001102, “Recommended Option #2 was approved by the Program Workgroup. This option includes migrating the two (2) proof of concept interfaces as well as to include the DHSMV interface ...”
- “Proof of concept,” for this project, means identifying a small subset of APIs that represent different protocol types that will be tested, and deployed into a pre-production environment, via the SOA and API layer by June 30, 2023.

### **Out of Scope**

The following elements are out of scope, meaning that they are not expected to be performed during the project timeframe, and have been deferred to the Continuous Modernization Program.

- Defining the final CX/UX configuration
- Non-real-time web-based services
- per DCSN0001102, “...and designate remaining interfaces to be modernized during the continuous modernization process. Any newly designed interfaces required for the operation of the CX/UX application would be addressed by the CX/UX vendor selected for that project.”
- \*\* Change Request 10 has modified the project’s scope to align API development with the Continuous Modernization Program

- \*\*\* As a result of decision “DCSN0001302 - Technology Tools Projects Deliverables Schedule Tracking”, “ALL deliverables for the technology tools contract are being tracked in the CX/UX schedule....” As such, any scope tied to project deliverables will be out of scope for SOA/API, as follow:
  - Scope being transferred to CXUX
    - Install and configure API layer
    - Test tools defined with API layer tool procurement
    - ID and document any Enterprise Service Bus (ESB) requirements
    - Document the resulting API architectural standard for lessons learned in support of the Incremental Customer Experience/User Experience Mobile-Responsive Transformation (CX/UX) project.
- \*\*\*\* This is the final OWP report for the SOA and API Layer project. The project close report has been written and signed off by the project manager and project owner.

**B. Project Objectives and Business Benefits**

As noted in the Charter above, “The SOA and API layer project will deliver improved scalability due to the service-oriented architecture allowing independent scaling of each service.”

As discussed by MuleSoft in its whitepaper, “API Strategy Essentials Blueprint,” “By developing APIs internally, businesses reduce the limitations from their legacy systems — transforming how they deliver digital products, services, and business capabilities.” MuleSoft goes on to say that “...some real-world outcomes that organizations have targeted” include:

- Better and well-aligned customer experiences.
- Improved partnerships.
- Increased transparency.
- Accurate/timely reporting.
- Increased brand awareness.
- Improved customer self-service.

In accordance with the RA Modernization Program’s benefits realization tracking process, the following business objectives, benefits, and measurement indicators are elaborated below.

Business Objective	Benefits	Measurement Indicators
Increase overall System security	External entities will be limited to targeted access to the System	*APIs are connected to the integration platform rather than the System database
DEO will have a modular foundation that enables continuous modernization	An integration platform will be installed, configured, and tested.	The integration platform engine passes all testing

DEO will have a modular foundation that enables continuous modernization	Improved System performance	Applications will be integrated with the integration platform instead of the System database
--	-----------------------------	--

### C. Critical Success Factors

As indicated in the benefits realization summary above, which indicate the conditions by which the DEO will consider the project successful, the following critical success factors align with the business objectives of the project.

- Timely and high-quality achievement of major milestones/deliverables.
- Ability for remaining modernization efforts to utilize the API tools for their continued efforts.

### D. Key Dates\*

The following key dates are indicated, as of this writing, which have the potential to affect the project, in addition to those indicated in the project schedule shown in section III of this report.

Key Date	Importance and Relevance to the Project
03/07/2023	2023 Legislative Regular Session convenes
05/05/2023	2023 Legislative Regular Session last day
06/30/2023	Completion of Program Phase 1a

\* This is the final OWP report for the SOA and API Layer project. The project close report has been written and signed off by the project manager and project owner.

### E. Major Deliverables\*

The major deliverables for the project represent the quantifiable products and services that will be provided during the period of project performance. These are shown below and are specific for this project.

Major Deliverable	Deliverable Description
Project Charter	Complete and submit a detailed project charter to DEO.
Project Management Plan	Complete and submit a detailed project management plan to DEO.
Weekly Status Meetings	Host weekly status meeting with DEO project team.
Weekly Status Reports	Provide weekly status reports to DEO project team.
SOA/API Procurement for Tool and Services	Procurement, installation, configuration, of the Enterprise Services Bus (ESB) and the Application Program Interface (API) gateway.
Requirements Traceability Matrix	Functional and technical requirements are documented, validated, and verified.
User stories and test plans	Preparation for API migration in support of adopting new technology (ESB and API gateway)

Major Deliverable	Deliverable Description
Documentation	Documentation of ESB requirements and the API architectural standard. Documentation of lessons learned.
Project Closeout Report*	A report summarizing the performance of the project upon completion will be provided in accordance with SPO guidelines.

\*This is the final OWP report for the SOA and API Layer project. The project close report has been written and signed off by the project manager and project owner.

### F. Major Milestones\*

The major milestones represent those synchronization points that mark the transition of the SOA/API project from one phase to another and are shown below. These are key events with a zero duration, and which indicate that a specific stage of the project has been reached.

Major Milestone	Milestone Description
Initiation: Project Startup	Complete: Project kickoff meeting, development of the project charter, identification of key stakeholders, development of the project plan, development of the staffing plan, development of the cost plan, development of the baseline schedule, and conducting an RCA (risk and complexity assessment) as a phase gate.
Planning: Identification and prioritization of APIs and Requirements	Complete: Determining which APIs (application program interfaces) are in scope for the project. Identification of the requirements associated with each API. Conducting an RCA as a phase gate.
Execution Phase: Procurement for Tool and Services	Complete: Procure vendor services and software for the installation, configuration, and testing of the ESB toolset and API gateway in support of the Services Oriented Architecture (SOA)
Execution Phase: Vendor performance and Documentation	Complete: Vendor onboarding, RTM review, and vendor project plan.
Monitor and Controlling Phase	Complete: Activities focused on keeping track of overall project status and any change control activities.
*Closeout Phase	Complete: To be started upon completion of the execution phase.

\* This is the final OWP report for the SOA and API Layer project. The project close report has been written and signed off by the project manager and project owner.

## G. Key Stakeholders

Key stakeholders for the SOA/API project represent those specific people and groups that have a vested interest in the project. The stakeholder registry for the SOA/API project is a living document that requires periodic updates.

Key Stakeholder	Project Interest
Meredith Ivey	Acting Secretary, Department of Economic Opportunity
Lindsay Volpe	Deputy Secretary, Division of Workforce Services
Domenic DiLullo	Chief Technology Officer
Paul Forrester	Chief Information Officer
Allyce Moriak	Chief Financial Officer
Wendy Castle	RA Modernization Program Owner – Business
Nicole Sanislow	RA Modernization Program Manager – Business
Tom Richardson	RA Modernization Lead Program Manager – Strategic Planning Office
Garrick Wright	RA Modernization Program Manager – Information Technology
Thomas Holliday	RA Modernization Program Manager – Strategic Planning Office
Ben Beha (acting)	Project Owner
Nicholas Kaoudis	Project Manager
Project Team	See Project Roles and Responsibilities

## H. Significant Project Assumptions and Constraints

SOA/API project assumptions and constraints identify those important conditions that may affect the outcome of the project, and which are reflected in project planning.

### Project Assumptions

1. Personnel with sufficient expertise will be on-boarded and allocated to the execution of this project.
  2. The API development tool and SOA/API vendor will be acquired within the available timeframe for the project.
  3. \*\*\*The ESB will be installed, configured, and tested by the SOA/API vendor within the available timeframe for the project.
  4. \*\*\*Documentation of SOA/API architectural standards will be successfully completed within the available timeframe for the project.
  5. Project is reliant upon a modular system architecture, based on recommendations from the SSI vendor, representing best of breed tools.
  6. Change Request 10 has modified the project’s scope to align the API development with the Continuous Modernization Program
  7. Change Request 14 has modified the project’s schedule end date to 06/30/23
- \*\*\* As a result of decision “DCSN0001302 - Technology Tools Projects Deliverables Schedule Tracking”, “ALL deliverables for the technology tools contract are being tracked in the CX/UX schedule....”

### **Project Constraints**

1. Limited time and capacity of resources (internal and external) assigned to assist in the completion of the major deliverables.
2. Dependencies external to the project which result in delays in execution, i.e., delays in finalizing System architecture and formal API tool decision.

## II. Work Breakdown Structure

The following work breakdown structure clarifies the SOA/API project down to each specific work package. The intent of the work breakdown structure is to define the scope of work to be performed into logical groupings of related activity.

### A. Work Breakdown Structure\*

WBS	Task Name
<b>1</b>	<b>SOA API Layer</b>
<b>1.1</b>	<b>Initiation</b>
1.2	Initiation Phase complete
<b>1.3</b>	<b>Planning</b>
1.3.1	Planning Phase Start
<b>1.3.2</b>	<b>Deliverable: Resource Plan</b>
1.3.3	Resource Plan Complete
<b>1.3.4</b>	<b>Deliverable: Project Schedule</b>
1.3.5	Project Schedule complete
<b>1.3.6</b>	<b>Deliverable: Project Management Plan</b>
1.3.7	Project Management Plan complete
<b>1.3.8</b>	<b>Deliverable: Project Budget</b>
1.3.9	Project Budget complete
<b>1.3.10</b>	<b>Deliverable: Project Spending Plan</b>
1.3.11	Project Spending Plan complete
<b>1.3.10</b>	<b>Deliverable: Project Test Plan</b>
1.3.11	Project Spending Plan complete
<b>1.3.12</b>	<b>Requirements:</b>
<b>1.3.13</b>	<b>Conduct Lessons Learned Meeting</b>
1.3.14	Deliverable: Planning Gate RCA Assessment
1.4	Planning Phase Complete
<b>1.5</b>	<b>Execution</b>
1.5.1	Execution Phase Start
<b>1.5.2</b>	<b>Phase 1a - API Technology Adoption</b>
<b>1.5.2.1</b>	<b>Recommendations, Standards, Decisions</b>
<b>1.5.2.2</b>	<b>SOA/API Vendor and API Tool Procurement</b>
<b>1.5.2.3</b>	<b>Vendor under Contract</b>
<b>1.5.2.4</b>	<b>Vendor Project Planning</b>
<b>1.5.2.5</b>	<b>***Install and configure API layer</b>
<b>1.5.2.6</b>	<b>SSA &amp; FIRRE Investigation (User Stories)</b>
<b>1.5.2.7</b>	<b>Operations and Maintenance Plan</b>
1.5.3	Phase 1a - Complete
<b>1.5.4</b>	<b>Phase 1b – DHSMV (User Stories)</b>
1.5.5	Phase 1b - Complete

<b>1.5.6</b>	<b>Conduct Lessons Learned Meeting</b>
1.6	Execution Phase complete
<b>1.7</b>	<b>Monitoring and Controlling</b>
1.8	Monitoring and Controlling Phase Complete
<b>1.9</b>	<b>Project Closeout (ex. Optional scope)</b>
1.10	Closeout Phase complete

\* Change Request 10 has modified the scope of the project to align API development with the Continuous Modernization Program. As a result of the pending contract, as indicated per the RFQ, the Execution phase of the project is expected to change, which will be updated on the next report, assuming contract execution during February 2023.

\*\*\* As a result of decision “DCSN0001302 - Technology Tools Projects Deliverables Schedule Tracking”, “ALL deliverables for the technology tools contract are being tracked in the CX/UX schedule....”

## B. Work Breakdown Structure Data Dictionary

The data dictionary provides descriptive language for each element in the WBS for the SOA/API project.

WBS	Task Name	Definition
<b>1</b>	<b>SOA API Layer</b>	As a part of the Reemployment Assistance (RA) Modernization Program, the SOA and API Layer project will establish a solid architectural basis in support of the continuous modernization by defining a new architectural basis for a service-oriented architecture (SOA) for the modernized System.
<b>1.1</b>	<b>Initiation</b>	Project startup activities, including but not limited to: Kickoff meeting, Project Charter, and Pre/Post Initiation RCAs
1.2	Initiation Phase complete	Milestone
<b>1.3</b>	<b>Planning</b>	Building the structural management tools for the project
1.3.1	Planning Phase Start	Milestone
<b>1.3.2</b>	<b>Deliverable: Resource Plan</b>	Included in the Project Management Plan (PMP), indicates resources required for execution of the project
1.3.3	Resource Plan Complete	Milestone
<b>1.3.4</b>	<b>Deliverable: Project Schedule</b>	Living document set (baseline and status) of scheduled project activities
1.3.5	Project Schedule complete	Milestone

WBS	Task Name	Definition
<b>1.3.6</b>	<b>Deliverable: Project Management Plan</b>	Master project management book containing sub-plans for resources, budget, schedule, and program level plans, such as communications and risk management
1.3.7	Project Management Plan complete	Milestone
<b>1.3.8</b>	<b>Deliverable: Project Budget</b>	Included in the PMP, indicates budgeted funds required for execution of the project
1.3.9	Project Budget complete	Milestone
<b>1.3.10</b>	<b>Deliverable: Project Spending Plan</b>	Included in the PMP, indicates timing of the projected expenditure of budgeted funds required for execution of the project
1.3.11	Project Spending Plan complete	Milestone
<b>1.3.10</b>	<b>Deliverable: Project Test Plan</b>	High level testing plan approach for the project. One plan per interface (SSA, FIRRE-Investigation, DHSMV).
1.3.11	Project Spending Plan complete	Milestone
<b>1.3.12</b>	<b>Requirements:</b>	Traceability matrix for project technical and functional requirements
<b>1.3.13</b>	<b>Conduct Lessons Learned Meeting</b>	Accumulation of knowledge gained regarding "how to" avoid pitfalls during each phase of the project
1.3.14	Deliverable: Planning Gate RCA Assessment	Phase gate to assess risk and complexity status of the project
1.4	Planning Phase Complete	Milestone
<b>1.5</b>	<b>Execution</b>	Accomplishing the statement of work for the project
1.5.1	Execution Phase Start	Milestone
<b>1.5.2</b>	<b>Phase 1a - API Technology Adoption</b>	Adoption of an ESB-based SOA via installation of the ESB and the API layer.
<b>1.5.2.1</b>	<b>Recommendations, Standards, and Decisions</b>	SSI vendor API tool recommendation and delivery of related architectural standards
<b>1.5.2.2</b>	<b>SOA/API Vendor and API Tool Procurement</b>	Documentation of ESB requirements, SOW/RFQ development, advertisement, and contract award
<b>1.5.2.3</b>	<b>Vendor under Contract</b>	Milestone
<b>1.5.2.4</b>	<b>Vendor Project Planning</b>	Vendor on-boarding, Requirements review, and vendor project plan
<b>1.5.2.5</b>	<b>***Install and configure API layer</b>	Software installation and test into the development, test, pre-prod, and production environments

WBS	Task Name	Definition
1.5.2.6	<b>SSA &amp; FIRRE Investigation (User Stories)</b>	Drafting, business review, and technical review of user stories associated with SSA and FIRRE Investigation APIs
1.5.2.7	<b>Operations and Maintenance (O&amp;M) Plan</b>	Drafting, review, feedback, changes, and approval of the O&M plan for the ESB and API layer
1.5.3	Phase 1a - Complete	Milestone
1.5.4	<b>Phase 1b – DHSMV (User Stories)</b>	Drafting, business review, and technical review of user stories associated with the DHSMV APIs
1.5.5	Phase 1b - Complete	Milestone
1.5.6	<b>Conduct Lessons Learned Meeting</b>	Accumulation of knowledge gained regarding "how to" avoid pitfalls during each phase of the project
1.6	Execution Phase complete	Milestone
1.7	<b>Monitoring and Controlling</b>	Activities intended to observe the health of the project and report on its progress
1.8	Monitoring and Controlling Phase Complete	Milestone
1.9	<b>Project Closeout</b>	Activities intended to conclude the project, focusing on documentation and results
1.10	Closeout Phase complete	Milestone

\*\*\* As a result of decision “DCSN0001302 - Technology Tools Projects Deliverables Schedule Tracking”, “ALL deliverables for the technology tools contract are being tracked in the CX/UX schedule....”

### ***III. Resource Loaded Project Schedule\****

The SOA/API project schedule indicates the planned timetable for all project-related work and estimates the appropriate staffing levels necessary to accomplish each task, to produce each deliverable, and to achieve each milestone.

The SOA and API Layer project has been dependent on the procurement of an API toolset/development product and the SOA/API project vendor, which is now complete. The project is currently focused on on-boarding of resources and gaining knowledge about the MuleSoft toolset that was selected for SOA/API development.

Resources are independently loaded in ServiceNow, representing a minimum of a three-month forecast requirement, based on individual feedback from each identified resource. Resources to be provided by the SOA/API vendor are expected to be tracked by the vendor. However, the vendor is responsible for providing a staffing plan that will indicate resources associated with the tools projects, of which the SOA/API project is one of three.

The final project status schedule\*\*\*, is shown below. This is the final OWP report for the SOA and API Layer project. The project close report has been written and signed off by the project manager and project owner.

WBS	Task Name	Duration	Start	Finish	% Complete
<b>1</b>	<b>SOA API Layer</b>	<b>307.25 days</b>	<b>Tue 2/1/22</b>	<b>Wed 4/26/23</b>	<b>100%</b>
<b>1.1</b>	<b>Initiation</b>	<b>59 days</b>	<b>Tue 2/1/22</b>	<b>Fri 4/22/22</b>	<b>100%</b>
1.2	Initiation Phase complete	0 days	Fri 4/22/22	Fri 4/22/22	100%
<b>1.3</b>	<b>Planning</b>	<b>176.53 days</b>	<b>Tue 2/15/22</b>	<b>Tue 10/25/22</b>	<b>100%</b>
1.4	Planning Phase Complete	0 days	Tue 10/25/22	Tue 10/25/22	100%
<b>1.5</b>	<b>Execution</b>	<b>220 days</b>	<b>Fri 4/22/22</b>	<b>Wed 3/15/23</b>	<b>100%</b>
1.5.1	Execution Phase Start	0 days	Fri 5/6/22	Fri 5/6/22	100%
<b>1.5.2</b>	<b>Phase 1a - API Technology Adoption***</b>	<b>218.75 days</b>	<b>Fri 4/22/22</b>	<b>Tue 3/14/23</b>	<b>100%</b>
1.5.3	Phase 1a - Complete	0 days	Tue 3/14/23	Tue 3/14/23	100%
<b>1.5.4</b>	<b>Phase 1b - DHSMV (User Stories Only)</b>	<b>39 days</b>	<b>Wed 9/7/22</b>	<b>Mon 10/31/22</b>	<b>100%</b>
1.5.5	Phase 1b - Complete	0 days	Mon 10/31/22	Mon 10/31/22	100%
<b>1.5.6</b>	<b>Conduct Execution Phase Lessons Learned Meeting</b>	<b>1 day</b>	<b>Tue 3/14/23</b>	<b>Wed 3/15/23</b>	<b>100%</b>
1.6	Execution Phase complete	0 days	Wed 3/15/23	Wed 3/15/23	100%
<b>1.7</b>	<b>Monitoring and Controlling</b>	<b>306.37 days</b>	<b>Tue 2/1/22</b>	<b>Wed 4/26/23</b>	<b>100%</b>
1.7.1	Start Monitoring and Controlling	0 days	Tue 2/1/22	Tue 2/1/22	100%
<b>1.7.2</b>	<b>Manage Project Constraints, Proj Spec Prog Issues, Change Control</b>	<b>306 days</b>	<b>Wed 2/2/22</b>	<b>Wed 4/26/23</b>	<b>100%</b>
<b>1.7.3</b>	<b>Program Support</b>	<b>78 days</b>	<b>Thu 9/1/22</b>	<b>Fri 12/30/22</b>	<b>100%</b>
1.8	Monitoring and Controlling Phase Complete	0 days	Wed 4/26/23	Wed 4/26/23	100%
<b>1.9</b>	<b>Project Closeout</b>	<b>29 days</b>	<b>Thu 3/16/23</b>	<b>Tue 4/25/23</b>	<b>100%</b>
1.9.1	Schedule Project Closeout Meeting	0.25 days	Thu 3/16/23	Thu 3/16/23	100%

WBS	Task Name	Duration	Start	Finish	% Complete
1.9.6	<b>Conduct Lessons Learned Meeting</b>	1.5 days	Thu 3/16/23	Fri 3/17/23	100%
1.9.2	<b>Deliverable: Project Closeout Report</b>	6 days	Tue 4/18/23	Tue 4/25/23	100%
1.9.3	Project Closeout Report complete	0 days	Tue 4/25/23	Tue 4/25/23	100%
1.9.5	Conduct Project Closeout meeting	0.25 days	Wed 4/26/23	Wed 4/26/23	100%
1.10	Closeout Phase complete	0 days	Wed 4/26/23	Wed 4/26/23	100%

\*\*\* As a result of decision “DCSN0001302 - Technology Tools Projects Deliverables Schedule Tracking”, “ALL deliverables for the technology tools contract are being tracked in the CX/UX schedule....”

#### ***IV. Project Spending Plan***

The SOA and API Layer project spending plan is managed in ServiceNow. The spend plan represents anticipated expenditures by fiscal year.

Change Request 10 has modified the scope of the project to align existing API development with the Continuous Modernization Program. The API development tool is expected to be operational during the RA Mod Program in support of any project that requires new API development.

FY 2021-22 Expenditures	FY 2022-23 Expenditures
Software: \$0.00	Software: \$439,927.00
Other CapEx: \$1,500.00	Other CapEx: \$33,450.00

#### ***V. Project Organization and Methodology***

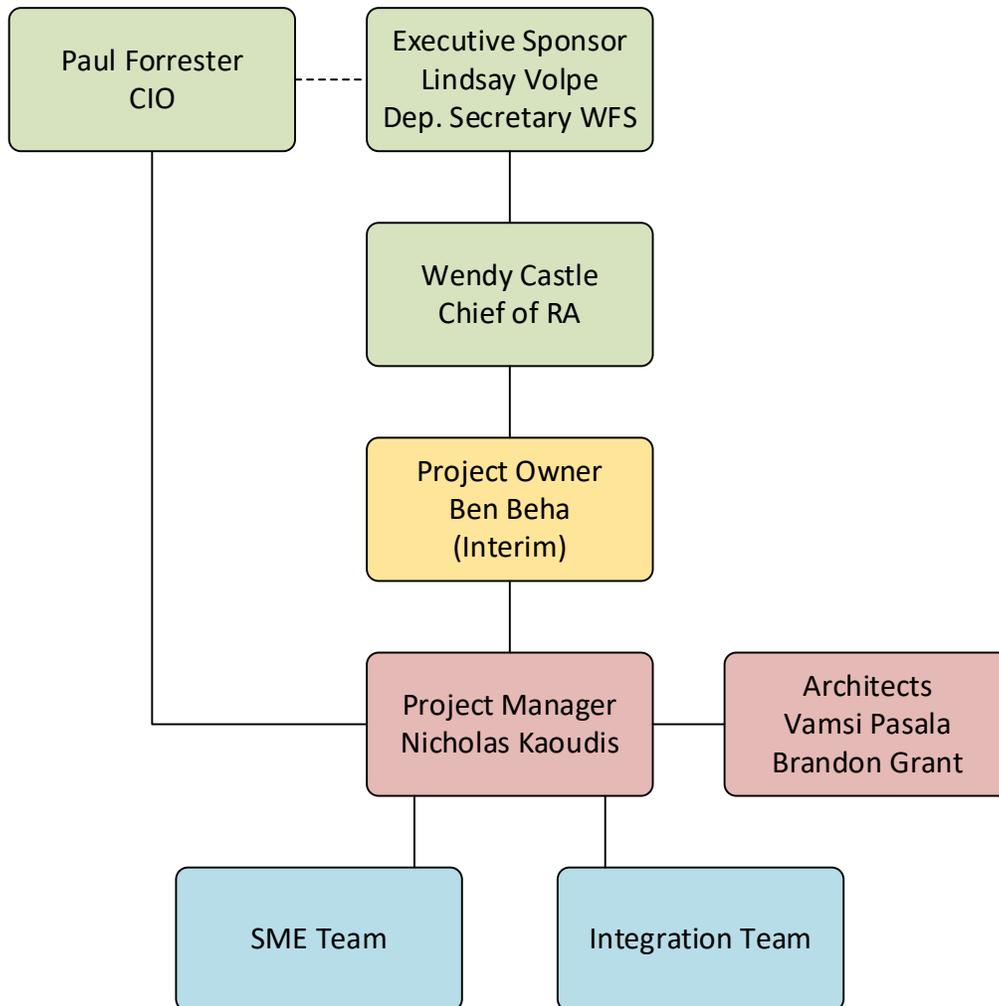
As indicated in the “Project Roles and Responsibilities” table below, there are various technical team members assigned to this project, along with subject matter experts, an OCM lead, and a project manager. Additionally, the SOA/API vendor services have been procured, which will provide resources in accordance with the SOW for that procurement, as stated in contract C3505.

It is important to delineate the scope of work between the SSI vendor and the SOA/API vendor, as they are separate vendors with separate areas of responsibility.

SSI Vendor***	SOA/API Vendor***
Responsible to develop requirements for the SOA/API vendor procurement.	Responsible to provide expertise to install, configure, and test the API tool.
Responsible to develop requirements for the SOA/API Layer development tool and platform.	Responsible to deploy/assist DEO in the deployment of the API gateway.
Responsible for integration services	

\*\*\* As a result of decision “DCSN0001302 - Technology Tools Projects Deliverables Schedule Tracking”, “ALL deliverables for the technology tools contract are being tracked in the CX/UX schedule....”

### A. Project Organizational Chart



## B. Project Roles and Responsibilities

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> <li>• Provide guidance on overall strategic direction</li> <li>• Advising the Strategic Planning Office and project manager of risks that may impact the project</li> <li>• Facilitate resolution of significant issues in the project</li> <li>• Reviewing and signing off on key milestones</li> </ul>
Domenic DiLullo	CTO	<ul style="list-style-type: none"> <li>• Provide guidance on overall strategic direction</li> <li>• Advising the Strategic Planning Office and project manager of risks that may impact the project</li> <li>• Facilitate resolution of significant issues in the project</li> <li>• Reviewing and signing off on key milestones</li> </ul>
Wendy Castle	Chief of RA Program Owner	<ul style="list-style-type: none"> <li>• Provide guidance on overall strategic direction</li> <li>• Advising the Strategic Planning Office and project manager of risks that may impact the project</li> <li>• Facilitate resolution of significant issues in the project</li> <li>• Reviewing and signing off on key milestones</li> </ul>
Paul Forrester	CIO Program Owner Work Group	<ul style="list-style-type: none"> <li>• Responsible for the Strategy of DEO IT</li> <li>• Responsible for Staffing and Support plans</li> <li>• Responsible for day-to-day operations</li> <li>• Responsible for working closely with programs on technology needs</li> </ul>
Ben Beha (interim)	Project Owner	<ul style="list-style-type: none"> <li>• Contributes subject matter expertise</li> <li>• Assists the Project Managers in responding to risks and issues</li> <li>• Assists the Project Manager in evaluating change requests</li> <li>• Reviews deliverables and project documents, identifying any deficiencies</li> <li>• Reviews and approves deliverables</li> </ul>
Nicholas Kaoudis	Project Manager	<ul style="list-style-type: none"> <li>• Manage all aspects of the project and ensure compliance with PMP</li> <li>• Monitor project progress and schedule adherence</li> <li>• Complete all documents related to the project</li> <li>• Identify and manage risks according to the PMP</li> </ul>

Name	Project Role	Responsibility
Vamsi Pasala	Architect and Technical Lead	<ul style="list-style-type: none"> <li>• Responsible for assisting the team in finding solutions to issues elevated to him</li> <li>• Is available to project sponsors for technical questions regarding direction of the project and any dependencies/impacts of other projects</li> <li>• Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team.</li> </ul>
SME Team	Subject Matter Experts	<ul style="list-style-type: none"> <li>• Process development tasks</li> <li>• Contributes subject matter expertise</li> <li>• Complete assigned project tasks in accordance with the Project Schedule</li> <li>• Identifies risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP</li> <li>• Assists the Project Managers in responding to risks and issues</li> <li>• Assists the Project Manager in evaluating change requests</li> </ul>
Review Team	Documentation Reviewers	<ul style="list-style-type: none"> <li>• Reviews documentation when submitted by Vendor</li> <li>• Contributes subject matter expertise</li> <li>• Completes assigned project tasks in accordance with the Project Schedule</li> <li>• Identifies risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP</li> <li>• Assists the Project Managers in responding to risks and issues</li> <li>• Assists the Project Manager in evaluating change requests</li> </ul>
Vendor	Strategic Planning Office (SPO)	<ul style="list-style-type: none"> <li>• Monitors project progress</li> <li>• Facilitates DEO Leadership Team Governance meetings</li> <li>• Provides guidance and support to project manager and project team members</li> </ul>
Vendor	TCS - SOA/API	<ul style="list-style-type: none"> <li>• Establish a solid architectural basis in support of the continuous modernization by defining a new architecture based on .NET Core, Web API framework, and a service-oriented architecture for the modernized System application.</li> </ul>

### **C. Project Management Methodology**

DEO will use a project management methodology in compliance with project standard rule 60GG-2 F.A.C., product requirements, and DEO experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure DEO's satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. DEO believes strong project management is critical throughout the life of any successful project.

For this project, DEO's project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from DEO within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the DEO Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- DEO's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

DEO believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication

### **VI. *Business Process Organizational Change Management Plan***

This project intends to improve the delivery, execution, security, or convenience of DEO's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Program-wide Organizational Change Management Plan
- Organizational Change Readiness Assessment
- Change Impact Analysis
- Communications Plan

- Change Champion Network
- Training Plan
- Change Management Metrics
- Post-implementation Support Plan

**VII. Project Risk Management Plan**

This project will follow the [Risk Management Plan](#), captured within the Reemployment Assistance Program Management Plan. The Reemployment Assistance Modernization Program team follows a standard method for logging and categorizing issues, researching solutions, and communicating options and final recommendations. Project team members should actively contribute, as it is critical to timely decisions and moving past roadblocks. The buy-in of the project team, key team members and technical staff is critical to the success and ensures that the project team delivers a product in line with the project goals.

Key activities of the risk management process include:

- **Risk Identification** – Identifying risks that could potentially impact the project.
- **Risk Analysis** – Prioritize risks and assess the probability and consequence of the risk.
- **Risk Response Planning** – Prepare action plans to enhance opportunities or minimize threats to the program.
- **Risk Monitoring** – Execute action plans and evaluate their effectiveness, tracking, and reviewing residual risks and identifying new risks.

Risks are entered into Service Now for monitoring and management.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1.				
2.				
3.				
4.				
5.				

**VIII. Capacity Plan**

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

This project does not involve the purchase/lease, configuration, and installation of significant computer hardware (more than 5% of project costs). For purposes of capacity planning, computer hardware includes servers, storage, and network infrastructure. Accordingly, a

Capacity Plan is not required. However, the following Program information is provided on Capacity Planning.

**Project Capacity Planning**

- **Establish Cross-Functional Team:** To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- **Calculate Resource Capacity:** Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- **Determine Resource Requirements:** For each project, look at the scope and what resources are required to do the task for the project.
- **Project Prioritization:** Via a weighted scoring model used for RA Mod, projects within the program have been prioritized for the purpose of optimizing resources and time.
- **Allocate Resources Based on Project Priority:** Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- **Keep the Lines of Communications Open:** Communicate between executives, project management leaders and stakeholders.
- **Document Known Risks:** Monitor risks such as union strikes, weather, government regulations that stop a project or create new ones unexpectedly.
- **Plan for How to Handle Not enough Capacity:** Understand that obtaining new needed resources takes time and advance planning is imperative.



**OPERATIONAL WORK PLAN  
FOR  
SYSTEM AND SOFTWARE INTEGRATION**

**FLORIDA DEPARTMENT OF ECONOMIC OPPORTUNITY  
DIVISION OF INFORMATION TECHNOLOGY  
AND  
DIVISION OF WORKFORCE SERVICES**

**FISCAL YEAR 2022-2023**

**QUARTER 4**

**PREPARED ON -05/03/2023**

**TABLE OF CONTENTS**

**SECTION 1 — OVERALL PROJECT PLAN ..... 3**

**I. PROJECT CHARTER..... 3**

A. SCOPE STATEMENT ..... 3

B. PROJECT OBJECTIVES AND BUSINESS BENEFITS..... 3

C. CRITICAL SUCCESS FACTORS ..... 4

D. KEY DATES ..... 4

E. MAJOR DELIVERABLES ..... 4

F. MAJOR MILESTONES ..... 5

G. KEY STAKEHOLDERS..... 5

H. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS..... 6

**II. WORK BREAKDOWN STRUCTURE ..... 7**

**III. RESOURCE LOADED PROJECT SCHEDULE..... 10**

**IV. PROJECT SPENDING PLAN ..... 13**

**V. PROJECT ORGANIZATION AND METHODOLOGY..... 14**

A. PROJECT ORGANIZATIONAL CHART ..... 14

B. PROJECT MANAGEMENT METHODOLOGY ..... 20

**VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN ..... 20**

**VII. PROJECT RISK MANAGEMENT PLAN..... 21**

**VIII. CAPACITY PLAN..... 23**

## SECTION 1 — OVERALL PROJECT PLAN

### I. Project Charter

#### A. Scope Statement

The Reemployment Assistance Claims and Benefits Information System’s (System) current architecture is not modular. Lack of modularity requires extensive regression testing for all system enhancements and updates. The current System has a high level of technical debt. This technical debt increases the cost of maintenance as well as the risk of unintended effects elsewhere in the System. To assist in software transformation, DEO has procured the services of a System software integrator to provide analysis, oversight, monitoring, and testing, and to assume the responsibilities for the foundational technical platform and systems and software integration services necessary to develop and implement the System’s current and future infrastructure for modernization. These integration efforts will allow DEO to secure services which can interoperate and communicate without relying on a common platform or technology. Connecting services, systems, and infrastructures and developing integration standards are the next steps for advancing the System’s maturity and System modularity for modernization. This will ensure that an optimized cloud service and delivery model is utilized to deliver business process improvements, functional enhancements, a mobile-responsive application, and modernized architectural efficiencies.

Integration services include documenting the existing technical requirements and specifications of the System and an analysis of the existing technical requirements and specifications. The analysis will determine what technical requirements and specifications need to be improved to increase the effectiveness and efficiency of the System and assist DEO with acquiring software and hardware solutions that support the Reemployment Assistance Modernization Program. This shall include full evaluation of the Reemployment Assistance Information Technology program that relates to the System.

#### In Scope

- A modern System that integrates the infrastructure, software, data, analytics, and security components of the RA Modernization program.

#### Out of Scope

- Business Process Optimization of Services
- Unit testing of individual projects

#### B. Project Objectives and Business Benefits

Project Objective	Business Benefit
Improved delivery of RA Benefits	Time to process claims is reduced
Improved functionality	Increased customer satisfaction and self-service alleviates dependencies on staffing
Improved system performance	System availability is improved Less regression testing

	Faster code delivery to production
A secure and scalable system with a sustainable system architecture	Reduction in capital expenditures

**C. Critical Success Factors**

- Improved customer experience/user experience (CX/UX).
- Implementation of a model that will serve Florida’s Reemployment Assistance needs for many years.
- Preservation of continuity of DEO operations and minimization of demands on DEO staff.
- Implementation of an operations model that will serve the Reemployment Assistance program for the long term.
- Compliance with state and federal standards.

**D. Key Dates**

Key Delivery Date	Importance and Relevance to the Project
04/14/2022	Project Kick-Off Meeting
04/19/2022	Project Management Plan
04/19/2022	Staffing Plan
06/27/2022	Training and Requirements Management Plan
08/24/2022	To-Be Technical Requirements
08/31/2022	To-Be Technical Requirements Working Sessions
09/12/2022	Transition Plan
10/17/2022	Architectural Standards for Overall System Modernization
10/21/2022	Technology Selection Reports
12/07/2022	Architecture Change Control and Approval Processes Transition Plan
01/31/2023	Procurement Support
04/28/2023	Enterprise Architecture Tool
05/10/2023	Final To-Be Technical Requirements Report
05/12/2023	Infrastructure Performance Requirements
05/12/2023	Performance Benchmarks
06/26/2023	Integration Testing
06/30/2023	Integration Services
06/30/2023	Testing Team
06/30/2023	Information Security and Regulatory Compliance
06/30/2024	Business Strategy Development
06/30/2023	Project Closure

**E. Major Deliverables**

Major Deliverable	Deliverable Description	Status
Deliverable 1	Project Kick-Off Meeting	Accepted

Major Deliverable	Deliverable Description	Status
Deliverable 2	Project Management Plan	Accepted
Deliverable 3	Staffing Plan	Accepted
Deliverable 4	To-Be Technical Requirements	Accepted
Deliverable 5	To-Be Technical Requirements Working Sessions	Accepted
Deliverable 6	Final To-Be Technical Requirements Report	In Progress
Deliverable 7	Design Documentation	In Progress
Deliverable 8	Infrastructure Performance Requirements	In Progress
Deliverable 9	Requirements Management Plan	Accepted
Deliverable 10	Architectural Standards for Overall System Modernization	Accepted
Deliverable 11	Performance Benchmarks	In Progress
Deliverable 12	Architecture Change Control and Approval Processes	Accepted
Deliverable 13	Oversight and Monitoring of Modernization Projects	In Progress
Deliverable 14	Integration Testing	
Deliverable 15	Integration Services	In Progress
Deliverable 16	Technology Selection	Accepted
Deliverable 17	Procurement Support	Accepted
Deliverable 18	Transition Plan	Accepted
Deliverable 19	Enterprise Architecture Tool	In Progress
Deliverable 20	Testing Team	In Progress
Deliverable 21	Information Security and Regulatory Compliance	In Progress
Deliverable 22	Business Strategy Development	In Progress

## F. Major Milestones

Major Milestone	Milestone Description
Initiation Phase Complete	All initiation activities completed
Planning Phase Complete	All planning activities completed
Execution Phase Complete	In Progress
Monitor and Controlling Phase Complete	In Progress
Closing Phase Complete	

## G. Key Stakeholders

Key Stakeholder	Project Interest
Meredith Ivey	Acting Secretary, Department of Economic Opportunity
Lindsay Volpe	Deputy Secretary, Division of Workforce Services
Domenic DiLullo	Chief Technology Officer
Paul Forrester	Chief Information Officer
Allyce Moriak	Chief Financial Officer
Wendy Castle	RA Modernization Program Owner - Business
Nicole Sanislow	RA Modernization Program Manager - Business
Tom Richardson	RA Modernization Program Manager – Strategic Planning Office

Sushma Kavarthapu	RA Modernization Program Manager – Information Technology
Mark Miller	Bureau of RA Operations, Project Owner
Ernie Sanders	Peraton Account Manager

## H. Significant Project Assumptions and Constraints

### Project Assumptions

Vendor will create/recommend solutions that promote useability, product innovation, and scalability by using innovative concepts and that are suitable for a government environment with funding constraints.

### Project Constraints

Design may be materially constrained by:

1. Governing provisions of federal or state laws and regulations
2. Requirement to reduce operating costs
3. A schedule constraint of June 2023

## II. Work Breakdown Structure

WBS	Task Name
<b>1</b>	<b>Amendment 3 executed 04-26-2023</b>
<b>1.1</b>	<b>Procurement Phase</b>
1.1.1	Draft RFQ
1.1.2	Post RFQ
1.1.3	Responses due from Vendors
1.1.4	Establish Evaluation Committee
1.1.5	Review vendor responses
1.1.6	Present Vendor Selection to Steering Committee
1.1.7	Submit questions to vendor
1.1.8	Receive responses from vendor
1.1.9	Re-Review Vendor Response with Evaluation Committee
1.1.10	Re-Review Vendor Selection with Steering Committee
1.1.11	Steering Committee Approves Selection
1.1.12	Negotiations with Selected Vendor
1.1.13	Present Selection to Secretary
1.1.14	Approve Selection and Award Contract
1.1.15	Close Procurement Phase
<b>1.2</b>	<b>Initiation</b>
<b>1.2.1</b>	<b>Risk and Complexity Assessment</b>
<b>1.2.2</b>	<b>Deliverable: Project Charter</b>
1.2.3	Project Charter complete
<b>1.2.4</b>	<b>Project Kickoff Meeting</b>
<b>1.2.5</b>	<b>Conduct Lessons Learned Meeting</b>
1.2.6	Initiation Phase complete
<b>1.3</b>	<b>Planning</b>
<b>1.3.1</b>	<b>Deliverable: Resource Plan</b>
1.3.2	Resource Plan Complete
<b>1.3.3</b>	<b>Deliverable: Project Schedule</b>
1.3.4	Project Schedule complete
<b>1.3.5</b>	<b>Deliverable: Project Management Plan</b>
1.3.6	Project Management Plan complete
<b>1.3.7</b>	<b>Deliverable: Project Budget</b>
1.3.8	Project Budget complete
<b>1.3.9</b>	<b>Deliverable: Project Spending Plan</b>
1.3.10	Project Spending Plan complete
1.3.11	Complete the Planning Gate R&C Assessment
<b>1.3.12</b>	<b>Conduct Lessons Learned Meeting</b>
1.3.13	Planning Phase complete

<b>1.4</b>	<b>Execution</b>
<b>2.4.1</b>	<b>Program Startup and Plan</b>
2.4.1.1	Program Start
2.4.1.2	Contract Modification - Start Date
<b>2.4.1.3</b>	<b>Program Assets (Planning, Design and Execution)</b>
<b>2.4.1.3.1</b>	<b>Deliverable 1 – Project Kick-Off Meeting</b>
<b>2.4.1.3.2</b>	<b>Deliverable 2 – Project Management Plan</b>
<b>2.4.1.3.3</b>	<b>Deliverable 3 – Staffing Plan</b>
<b>2.4.1.3.4</b>	<b>Deliverable 20 - Revise Staffing Plan</b>
2.4.1.3.5	MS - Deliverable 20 Staffing Update - Complete
<b>2.4.1.3.6</b>	<b>Deliverable 16 – Technology Selection, Provide DEO with Recommendations for Technology Selections</b>
<b>2.4.1.3.7</b>	<b>Deliverable 4 – To-Be Technical Requirements</b>
<b>2.4.1.3.8</b>	<b>Deliverable 5 – To-Be Technical Requirements Working Sessions</b>
<b>2.4.1.3.9</b>	<b>Deliverable 10 – Architectural Standards for Overall System Modernization</b>
<b>2.4.1.3.10</b>	<b>Deliverable 21 - Business Strategy Development</b>
<b>2.4.1.3.11</b>	<b>Integration Services - phase 1a</b>
<b>2.4.1.3.11.1</b>	<b>Deliverable 12 – Architecture Change Control and Approval Processes</b>
<b>2.4.1.3.11.2</b>	<b>Deliverable 13 – Oversight and Monitoring of Modernization Projects</b>
<b>2.4.1.3.11.2.1</b>	<b>Conduct Bi-Weekly Architectural Review Meetings</b>
<b>2.4.1.3.11.2.2</b>	<b>Bi-Weekly Architectural Meeting Minutes</b>
<b>1.3.6.4</b>	<b>Monitor Vendor Test Results</b>
2.4.1.3.11.2.3.1	Create technical Integration Roadmap for Projects
<b>2.4.1.3.11.2.3.2</b>	<b>Projects</b>
<b>2.4.1.3.11.2.3.2.1</b>	<b>Project 1-Cloud Migration</b>
2.4.1.3.11.2.3.2.2	Project 1-Closedown
<b>2.4.1.3.11.2.3.2.3</b>	<b>Project 11- CX / UX Mobile-Responsive Software Transformation</b>
2.4.1.3.11.2.3.2.3.1	Plan and Initiate (Setup Project)
<b>2.4.1.3.11.2.3.2.3.2</b>	<b>Phase 1a - CX UX Mobile Execution</b>
<b>2.4.1.3.11.2.3.2.3.3</b>	<b>Deliverable 14 – CX/UX - Integration Testing</b>
<b>2.4.1.3.11.2.3.2.3.4</b>	<b>Phase 1a - Deliverable-User Acceptance Testing (UAT)</b>
<b>2.4.1.3.11.2.3.2.3.5</b>	<b>Deliverable 15 – CX/UX - Integration</b>
2.4.1.3.11.2.3.2.4	Project 11-Closedown
<b>2.4.1.3.12</b>	<b>Deliverable 19 - Enterprise Architecture Tool</b>

2.4.1.3.13	<b>Deliverable 22 - Information Security and Regulatory Compliance</b>
2.4.1.3.14	<b>Assist with Technology Selection &amp; Procurement</b>
2.4.1.3.15	<b>Deliverable 21 - Business Strategy Development</b>
1.4.2	<b>Project Closure</b>
1.5	<b>Monitoring and Controlling</b>
1.5.1	Manage Project Schedule
1.5.2	Manage Project Scope
1.5.3	Manage Project Costs
1.5.4	Manage Project Risks
1.5.5	Manage Project Issues
1.5.6	Manage Decisions
1.5.7	Manage Action Items
1.5.8	Manage Cybersecurity
1.5.9	Update RTM
1.5.10	Record Lessons Learned
1.5.11	Prepare Regularly scheduled Status Reports
1.5.12	Conduct Regularly scheduled Status Meetings
1.5.13	<b>Conduct Lessons Learned Meeting</b>
1.5.14	Monitoring and Controlling Phase Complete
1.6	<b>Project Closeout</b>
1.6.1	Schedule Project Closeout Meeting
1.6.2	<b>Deliverable: Project Closeout Report</b>
1.6.3	Project Closeout Report complete
1.6.4	Conduct Knowledge Transfer
1.6.5	Conduct Project Closeout meeting
1.6.6	<b>Conduct Lessons Learned Meeting</b>
1.6.7	Closeout Phase complete

### III. Resource Loaded Project Schedule

ID	WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors	Successors	Resource Names
1	1	09 - System Software Integrator	0%						
2	1	Amendment 3 executed 04-26-2023	85%	406 days	Fri 12/10/21	Fri 6/30/23			
3	1.1	Procurement Phase	100%	82 days	Fri 12/10/21	Mon 4/4/22			
4	1.1.1	Draft RFQ	100%	11 days	Fri 12/10/21	Fri 12/24/21		5	Vamsi Pasala
5	1.1.2	Post RFQ	100%	0 days	Mon 12/27/21	Mon 12/27/21		6	Claudia Gunnels, Kelly Hartsfield
6	1.1.3	Responses due from Vendors	100%	26 days	Mon 12/27/21	Mon 1/31/22		8	
7	1.1.4	Establish Evaluation Committee	100%	0 days	Wed 1/5/22	Wed 1/5/22			Lindsay Volpe
8	1.1.5	Review vendor responses	100%	3 days	Tue 2/1/22	Thu 2/3/22	6	9	Mark Miller, Paul Forrester, Vamsi I
9	1.1.6	Present Vendor Selection to Steering Committee	100%	1 day	Fri 2/4/22	Fri 2/4/22	8	10	Claudia Gunnels
10	1.1.7	Submit questions to vendor	100%	2 days	Mon 2/7/22	Tue 2/8/22	9	11	Claudia Gunnels
11	1.1.8	Receive responses from vendor	100%	5 days	Wed 2/9/22	Tue 2/15/22	10	12	Claudia Gunnels
12	1.1.9	Re-Review Vendor Response with Evaluation Committee	100%	3 days	Thu 2/17/22	Mon 2/21/22	11	13	Mark Miller, Vamsi Pasala, Paul For
13	1.1.10	Re-Review Vendor Selection with Steering Committee	100%	2 days	Tue 2/22/22	Wed 2/23/22	12	14	Claudia Gunnels
14	1.1.11	Steering Committee Approves Selection	100%	0 days	Thu 2/24/22	Thu 2/24/22	13	15,16	Lindsay Volpe
15	1.1.12	Negotiations with Selected Vendor	100%	25.5 days	Thu 2/24/22	Thu 3/31/22	14	17	
16	1.1.13	Present Selection to Secretary	100%	20 days	Mon 3/7/22	Fri 4/1/22	14		Lindsay Volpe, Allyce Moriak
17	1.1.14	Approve Selection and Award Contract	100%	18 days	Thu 3/10/22	Mon 4/4/22	15	20	
18	1.1.15	Close Procurement Phase	100%	0 days	Mon 4/4/22	Mon 4/4/22			Monique Emmanuel
19	1.2	Initiation	100%	19 days	Tue 4/5/22	Fri 4/29/22			
20	1.2.1	Risk and Complexity Assessment	100%	2 days	Tue 4/5/22	Wed 4/6/22	17		
23	1.2.2	Deliverable: Project Charter	100%	18 days	Wed 4/6/22	Fri 4/29/22			
27	1.2.3	Project Charter complete	100%	0 days	Fri 4/29/22	Fri 4/29/22	26		
28	1.2.4	Project Kickoff Meeting	100%	7 days	Wed 4/6/22	Thu 4/14/22			
32	1.2.5	Conduct Lessons Learned Meeting	100%	11 days	Fri 4/15/22	Fri 4/29/22			
36	1.2.6	Initiation Phase complete	100%	0 days	Fri 4/29/22	Fri 4/29/22	35	39	
37	1.3	Planning	100%	27 days	Mon 5/2/22	Wed 6/8/22			
38	1.3.1	Deliverable: Resource Plan	100%	4 days	Mon 5/2/22	Thu 5/5/22			
42	1.3.2	Resource Plan Complete	100%	0 days	Fri 5/6/22	Fri 5/6/22	41		Monique Emmanuel
43	1.3.3	Deliverable: Project Schedule	100%	4 days	Wed 5/4/22	Mon 5/9/22			Monique Emmanuel
48	1.3.4	Project Schedule complete	100%	0 days	Tue 5/10/22	Tue 5/10/22	47		Monique Emmanuel
49	1.3.5	Deliverable: Project Management Plan	100%	3 days	Tue 5/10/22	Thu 5/12/22			
53	1.3.6	Project Management Plan complete	100%	0 days	Fri 5/13/22	Fri 5/13/22	52		Monique Emmanuel
54	1.3.7	Deliverable: Project Budget	100%	3 days	Thu 5/12/22	Mon 5/16/22			Monique Emmanuel
58	1.3.8	Project Budget complete	100%	0 days	Mon 5/16/22	Mon 5/16/22	57		Monique Emmanuel

Project: 09 - System Software In Date: Thu 5/4/23	Task	Inactive Task	Manual Summary Rollup	External Milestone
	Split	Inactive Milestone	Manual Summary	Deadline
	Milestone	Inactive Summary	Start-only	Progress
	Summary	Manual Task	Finish-only	Manual Progress
	Project Summary	Duration-only	External Tasks	

Page 1

ID	WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors	Successors	Resource Names	1 W
59	1.3.9	Deliverable: Project Spending Plan	100%	2 days	Thu 5/5/22	Fri 5/6/22			Monique Emmanuel	
63	1.3.10	Project Spending Plan complete	100%	0 days	Thu 5/19/22	Thu 5/19/22	62		Monique Emmanuel	
64	1.3.11	Complete the Planning Gate R&C Assessment	100%	1 day	Thu 6/2/22	Thu 6/2/22		66	Monique Emmanuel	
65	1.3.12	Conduct Lessons Learned Meeting	100%	3 days	Fri 6/3/22	Tue 6/7/22				
69	1.3.13	Planning Phase complete	100%	0 days	Wed 6/8/22	Wed 6/8/22	68			
70	1.4	Execution	72%	406 days	Fri 12/10/21	Fri 6/30/23				
71	2.4.1	Program Startup and Plan	73%	406 days	Fri 12/10/21	Fri 6/30/23				
72	2.4.1.1	Program Start	100%	0 days	Wed 4/6/22	Wed 4/6/22		76,98,84		
73	2.4.1.2	Contract Modification - Start Date	100%	0 days	Mon 4/24/22	Mon 4/24/22		109,317		
74	2.4.1.3	Program Assets -(Planning, Design and Execution)	73%	406 days	Fri 12/10/21	Fri 6/30/23				
75	2.4.1.3.1	Deliverable 1 – Project Kick-Off Meeting	100%	11 days	Wed 4/6/22	Wed 4/20/22				
83	2.4.1.3.2	Deliverable 2 – Project Management Plan	100%	42 days	Wed 4/6/22	Thu 6/2/22				
97	2.4.1.3.3	Deliverable 3 – Staffing Plan	100%	29 days	Wed 4/6/22	Mon 5/16/22				
108	2.4.1.3.4	Deliverable 20 - Revise Staffing Plan	38%	8 days	Mon 4/24/22	Wed 5/3/23				
112	2.4.1.3.5	MS - Deliverable 20 Staffing Update - Complete	0%	0 days	Wed 5/3/23	Wed 5/3/23	111			
113	2.4.1.3.6	Deliverable 16 – Technology Selection, Provide DEO with Recommendations for Technology Selections	100%	96 days	Wed 4/20/22	Wed 8/31/22				
145	2.4.1.3.7	Deliverable 4 – To-Be Technical Requirements	100%	95.55 days	Tue 5/10/21	Tue 9/20/22				
241	2.4.1.3.8	Deliverable 5 – To-Be Technical Requirements Working Sessi	100%	81 days	Tue 5/10/21	Tue 8/30/22				
289	2.4.1.3.9	Deliverable 10 – Architectural Standards for Overall System Modernization	100%	26 days	Thu 7/14/22	Fri 8/19/22				
315	2.4.1.3.1	Deliverable 21 – Business Strategy Development	0%	50 days	Mon 4/24/22	Fri 6/30/23				
330	2.4.1.3.1	Integration Services - phase 1a	56%	406 days	Fri 12/10/21	Fri 6/30/23				
331	2.4.1.3.1	Deliverable 12 – Architecture Change Control and Approval Processes	100%	28 days	Wed 11/2/22	Mon 12/12/22				
346	2.4.1.3.1	Deliverable 13 – Oversight and Monitoring of Modernization Projects	51%	406 days	Fri 12/10/21	Fri 6/30/23				
347	2.4.1.3.1	Conduct Bi-Weekly Architectural Review Meetings	72%	306 days	Fri 4/29/22	Fri 6/30/23				
379	2.4.1.3.1	Bi-Weekly Architectural Meeting Minutes	87%	301 days	Mon 5/2/22	Mon 6/26/22				
411	1.3.6.4	Monitor Vendor Test Results	43%	402 days	Fri 12/10/21	Mon 6/26/23				
412	2.4.1.3.1	Create technical Integration Roadmap for Projects	91%	21.25 days	Mon 3/27/22	Fri 4/28/23	561FS+35 di			
413	2.4.1.3.1	Projects	37%	402 days	Fri 12/10/21	Mon 6/26/23				
414	2.4.1.3.1	Project 1-Cloud Migration	100%	27 days	Thu 1/5/23	Fri 2/10/23				
424	2.4.1.3.1	Project 1-Closedown	100%	0 days	Fri 2/10/23	Fri 2/10/23	423			

Project: 09 - System Software In Date: Thu 5/4/23	Task	Inactive Task	Manual Summary Rollup	External Milestone
	Split	Inactive Milestone	Manual Summary	Deadline
	Milestone	Inactive Summary	Start-only	Progress
	Summary	Manual Task	Finish-only	Manual Progress
	Project Summary	Duration-only	External Tasks	

Page 2

ID	WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors	Successors	Resource Names	1 W
425	2.4.1.3.1	Project 11- CX / UX Mobile-Responsive Software Transformation	29%	402 days	Fri 12/10/21	Mon 6/26/23				
426	2.4.1.3.1	Plan and Initiate (Setup Project)	90%	20.5 days	Mon 3/13/21	Fri 4/28/23	565FS+25 d;	428FS+15		
427	2.4.1.3.1	Phase 1a - CX UX Mobile Execution	44%	270 days	Wed 6/1/21	Tue 6/13/23				
447	2.4.1.3.1	Deliverable 14 – CX/UX - Integration Testing	0%	25 days	Tue 5/23/21	Mon 6/26/21				
454	2.4.1.3.1	Phase 1a - Deliverable-User Acceptance Testing (UAT)	2%	401 days	Fri 12/10/21	Fri 6/23/23				
486	2.4.1.3.1	Deliverable 15 – CX/UX - Integration	0%	14 days	Tue 5/30/21	Fri 6/16/23				
493	2.4.1.3.1	Project 11-Closedown	0%	0 days	Fri 6/16/23	Fri 6/16/23	492			
494	2.4.1.3.1	Deliverable 19 - Enterprise Architecture Tool	13%	361 days	Fri 12/10/21	Fri 4/28/23				
501	2.4.1.3.1	Deliverable 22 - Information Security and Regulatory Compliance	3%	406 days	Fri 12/10/21	Fri 6/30/23				
517	2.4.1.3.1	Assist with Technology Selection & Procurement	100%	185 days	Tue 5/31/21	Mon 2/13/22				
571	2.4.1.3.1	Deliverable 21 - Business Strategy Development	0%	50 days	Fri 12/10/21	Thu 2/17/22				
586	1.4.2	Project Closure	0%	21 days	Wed 5/31/21	Wed 6/28/21				
614	1.5	Monitoring and Controlling	90%	324 days	Tue 4/5/22	Fri 6/30/23				
615	1.5.1	Manage Project Schedule	90%	322 days	Thu 4/7/22	Fri 6/30/23			Monique Emmanuel	
616	1.5.2	Manage Project Scope	90%	322 days	Thu 4/7/22	Fri 6/30/23			Monique Emmanuel	
617	1.5.3	Manage Project Costs	90%	322 days	Thu 4/7/22	Fri 6/30/23			Monique Emmanuel	
618	1.5.4	Manage Project Risks	90%	322 days	Thu 4/7/22	Fri 6/30/23			Monique Emmanuel	
619	1.5.5	Manage Project Issues	90%	322 days	Thu 4/7/22	Fri 6/30/23			Monique Emmanuel	
620	1.5.6	Manage Decisions	90%	322 days	Thu 4/7/22	Fri 6/30/23			Monique Emmanuel	
621	1.5.7	Manage Action Items	90%	322 days	Thu 4/7/22	Fri 6/30/23			Monique Emmanuel	
622	1.5.8	Manage Cybersecurity	90%	322 days	Thu 4/7/22	Fri 6/30/23			Monique Emmanuel	
623	1.5.9	Update RTM	0%	11 days	Fri 6/16/23	Fri 6/30/23			Monique Emmanuel	
624	1.5.10	Record Lessons Learned	90%	1 day	Thu 6/15/23	Fri 6/16/23				
625	1.5.11	Prepare Regularly scheduled Status Reports	90%	324 days	Tue 4/5/22	Fri 6/30/23			Monique Emmanuel	
626	1.5.12	Conduct Regularly scheduled Status Meetings	90%	324 days	Tue 4/5/22	Fri 6/30/23			Monique Emmanuel	
627	1.5.13	Conduct Lessons Learned Meeting	0%	3 days	Fri 6/16/23	Tue 6/20/23				
631	1.5.14	Monitoring and Controlling Phase Complete	0%	0 days	Wed 6/21/21	Wed 6/21/23				
632	1.6	Project Closeout	0%	6 days	Thu 6/22/21	Fri 6/30/23				
633	1.6.1	Schedule Project Closeout Meeting	0%	1 day	Thu 6/22/23	Thu 6/22/23				
634	1.6.2	Deliverable: Project Closeout Report	0%	3 days	Fri 6/23/23	Tue 6/27/23				
638	1.6.3	Project Closeout Report complete	0%	0 days	Thu 6/29/23	Thu 6/29/23				
639	1.6.4	Conduct Knowledge Transfer	0%	1 day	Wed 6/28/21	Wed 6/28/23				

Project: 09 - System Software In Date: Thu 5/4/23	Task	Inactive Task	Manual Summary Rollup	External Milestone
	Split	Inactive Milestone	Manual Summary	Deadline
	Milestone	Inactive Summary	Start-only	Progress
	Summary	Manual Task	Finish-only	Manual Progress
	Project Summary	Duration-only	External Tasks	

Page 3

ID	WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors	Successors	Resource Names	1 W
640	1.6.5	Conduct Project Closeout meeting	0%	1 day	Thu 6/29/23	Thu 6/29/23				
641	1.6.6	Conduct Lessons Learned Meeting	0%	0 days	Fri 6/30/23	Fri 6/30/23				
645	1.6.7	Closeout Phase complete	0%	0 days	Fri 6/30/23	Fri 6/30/23				

Project: 09 - System Software In  
Date: Thu 5/4/23

Task		Inactive Task		Manual Summary Rollup		External Milestone
Split		Inactive Milestone		Manual Summary		Deadline
Milestone		Inactive Summary		Start-only		Progress
Summary		Manual Task		Finish-only		Manual Progress
Project Summary		Duration-only		External Tasks		

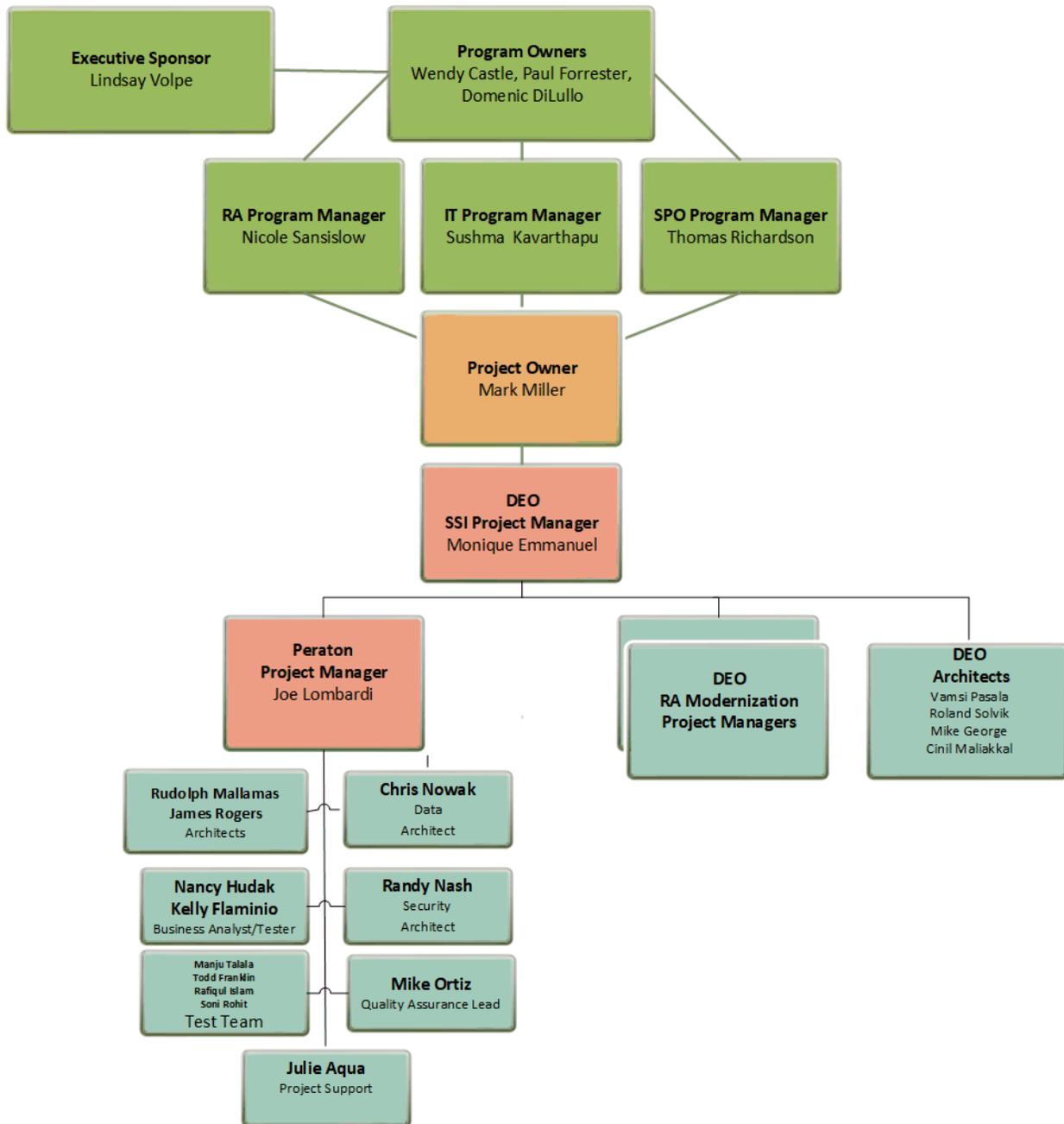
Page 4

**IV. Project Spending Plan**

<b>FY 2021-22 Expenditures</b>	<b>FY 2022-23 Expenditures</b>
Software: \$0	Software: \$0
OpEx: \$33,737.60	OpEx: \$4,519,107.31

## V. Project Organization and Methodology

### A. Project Organizational Chart



Project Roles and Responsibilities

<b>Project Role</b>	<b>Resource Name</b>	<b>Responsibilities</b>
<b>Executive Sponsor</b>	Lindsay Volpe	<ul style="list-style-type: none"> <li>- Provides resources and support for the program to enable its success</li> </ul>
<b>Program Owners</b>	Wendy Castle Paul Forrester Domenic DiLullo	<ul style="list-style-type: none"> <li>- Provide guidance on overall strategic direction</li> <li>- Advise the Strategic Planning Office and project manager of risks that may impact the project</li> <li>- Facilitate resolution of significant issues in the project</li> </ul>
<b>Program Managers</b>	Sushma Kavarthapu Thomas Richardson Nicole Sanislow	<ul style="list-style-type: none"> <li>- Provide guidance on overall strategic direction</li> <li>- Advise the Strategic Planning Office and project manager of risks that may impact the project</li> <li>- Facilitate resolution of significant issues in the project</li> <li>- Review and sign off on key milestones</li> </ul>
<b>Project Manager</b>	Monique Emmanuel	<ul style="list-style-type: none"> <li>- Manage all aspects of the project and ensure compliance with PMP</li> <li>- Monitor project progress and schedule adherence</li> <li>- Complete all documents related to the project</li> <li>- Identify and manage risks according to the PMP</li> </ul>
<b>Project Owner</b>	Mark Miller	<ul style="list-style-type: none"> <li>- Review deliverables and project documents, identifying any deficiencies</li> <li>- Review and approve deliverables</li> <li>- Review and approve RFCs</li> </ul>

<p><b>DEO Enterprise Architects</b></p>	<p>Vamsi Pasala  Roland Solvik  Mike George  Cinil Maliak</p>	<ul style="list-style-type: none"> <li>- Contribute subject matter expertise</li> <li>- Complete assigned project tasks in accordance with the Project Schedule</li> <li>- Identify risks and issues to the Project Manager in accordance with the Risk and Issue Management section of this PMP</li> <li>- Assist the Project Manager in responding to risks and issues</li> <li>- Assist the Project Manager in evaluating change requests</li> </ul>
<p><b>SSI Delivery Team Lead</b></p>	<p>Joe Lombardi</p>	<ul style="list-style-type: none"> <li>- Responsible for managing System integration and modernization program operations.</li> <li>- Develops the program strategy, supporting business case and various enterprise-wide high-level project plans.</li> <li>- Ensures integration of projects and adjusts project scope, timing, and budgets as needed, based on the needs of the Department.</li> <li>- Communicates with Peraton and Department leadership, business leadership and IT Business Consultants to communicate program strategy, direction, and changes.</li> <li>- Responsible for delivering all projects contained in the System modernization portfolio of projects on time, within budget and meeting the strategic and business requirements of the Department.</li> <li>- Responsible for tracking key program milestones and implementing adjustments to achieve Department objectives.</li> <li>- Partners with Departmental senior leadership to identify and prioritize opportunities for using IT to achieve the goals of the enterprise.</li> <li>- Develops and maintains the program management plans and schedule.</li> <li>- Serves as the single point of accountability for contract delivery and execution and Peraton staff.</li> </ul>
<p><b>Solutions Architect</b></p>	<p>Rudolph Mallamas</p>	<ul style="list-style-type: none"> <li>- Responsible for providing senior level expertise on decision recommendations and priorities regarding the Department’s overall modernization initiative’s architecture.</li> </ul>

	James Rogers	<ul style="list-style-type: none"> <li>- Facilitates the establishment and implementation of standards and guidelines that guide the design of technology solutions including architecting and implementing solutions requiring integration of multiple platforms, operating systems, and applications across the program.</li> <li>- Reviews, advises, and designs standard software and hardware builds, system options, risks, costs vs. benefits and impact on the Department’s business process and goals.</li> <li>- Develops and documents the framework for integration and implementation for changes to technical standards.</li> <li>- Assists in the development of and manages an architecture governance process. Provides technical guidance to project team areas as appropriate.</li> <li>- Contributes to the development of requirements for the Department’s statements of work, reviews and evaluates vendor technical proposals, participates in source selection.</li> <li>- Tracks industry trends and maintains knowledge of new technologies to better serve the Department’s architecture needs.</li> </ul>
<b>Data Architect</b>	Chris Nowak	<ul style="list-style-type: none"> <li>- Responsible for program-wide data design, balancing optimization of data access with batch loading and resource utilization factors.</li> <li>- Designs and oversees the construction of data architectures, operational data stores, and data marts.</li> <li>- Focuses on program-wide data modeling and database design.</li> <li>- Provides significant input in the design of program data architecture standards, policies and procedures for the modernization program, structure, attributes, and nomenclature of data elements, and applies accepted data content standards to technology projects.</li> <li>- Contributes to business analysis, data acquisition and access analysis and design, Database Management Systems optimization, recovery strategy, and load strategy design and implementation.</li> </ul>
<b>Business Analyst &amp; Tester</b>	Nancy Hudak  Kelly	<ul style="list-style-type: none"> <li>- Performs as the subject matter expert in unemployment compensation/insurance for the team.</li> <li>- Works closely with the Department, business analysts, and team members to understand business requirements that</li> </ul>

	Flaminio	<p>drive the analysis and design of quality technical solutions.</p> <ul style="list-style-type: none"> <li>- Involved in the full program life cycle and is responsible for designing, testing, implementing, maintaining, and supporting applications software that is delivered on time and within budget.</li> <li>- Participates in component and data architecture design, performance monitoring, product evaluation and buy vs. build recommendations.</li> <li>- Contributes to program procurement activities to include statement of work requirements, proposal evaluation, and source selection.</li> <li>- Performs systems analysis and design.</li> <li>- Applies understanding of development, quality assurance and integration methodologies in overseeing the technical implementation of program requirements.</li> </ul>
<b>Transition &amp; Quality Manager</b>	Mike Ortiz	<ul style="list-style-type: none"> <li>- Leads the program transition activities for Peraton, planning and coordinating the transition on to and off of the Department.</li> <li>- Responsible for establishing and implementing Peraton’s quality assurance and compliance processes for the Department.</li> <li>- Works closely with Department and vendor project IT leaders to develop and implement an overall quality maturity roadmap and plan for each project.</li> <li>- Reviews progress toward the plan regularly with program IT and vendor leaders, technical teams to make modifications as necessary.</li> <li>- Establishes program IT service quality control standards, policies, and procedures. Monitors, evaluates, manages, and executes audit processes to ensure compliance.</li> <li>- Provides guidance and subject matter expertise to IT teams on QA methodologies and processes, educates them on their responsibilities/accountabilities for the purpose of achieving on-time and quality deliverables.</li> <li>- Makes recommendations and directs improvements to the software development lifecycle process.</li> <li>- Documents non-compliance to policies, process and standards and assists in their resolution.</li> </ul>
<b>Security Architect</b>	Randy Nash	<ul style="list-style-type: none"> <li>- Manages the development and delivery of security standards, best practices, architecture, and systems to ensure information system security across the program.</li> </ul>

		<ul style="list-style-type: none"> <li>- Implements processes and methods for auditing and addressing non-compliance to information security standards; facilitates migration of non-compliant environments to compliant environments.</li> <li>- Ensures compliance with standards and currency with State and Federal security requirements.</li> <li>- Manages and participates in the planning and implementation of security administration for all program projects.</li> <li>- Contributes to the evaluation and selection of security applications and systems.</li> <li>- Makes recommendations and assists in the implementation of changes to work methods and procedures to make them more effective or to strengthen security measures.</li> </ul>
<b>Program Integration Testers</b>	Jonathan T. Franklin Rafiqul Islam Manjula Tulala Soni Rohit	<ul style="list-style-type: none"> <li>- Prepares and plans for program integration testing.</li> <li>- Coordinates with project teams and communicates integration testing standards and requirements to them.</li> <li>- Documents program level integration test plans and scripts.</li> <li>- Conducts program level integration tests, identifies, and communicates test results to project teams, and conducts program level regression testing.</li> </ul>
<b>Project Support</b>	Julia Aqua	<ul style="list-style-type: none"> <li>- Assist SSI Delivery Team Lead with meeting agendas and minutes.</li> <li>- Provide project schedule updates</li> </ul>
<b>RA Modernization Project Managers</b>	Nicole Cain Nicholas Kaoudis James Sparks David Sinclair Linda Lawler Christian Stephens Sandeep Aggarwal	<ul style="list-style-type: none"> <li>- Contribute subject matter expertise</li> <li>- Complete assigned project tasks in accordance with the Project Schedule</li> <li>- Identify risks and issues to the Project Manager in accordance with the Risk and Issue Management section of this OWP</li> <li>- Assist the Project Manager in responding to risks and issues</li> <li>- Assist the Project Manager in evaluating change requests</li> </ul>

	Anthony Perna	
--	---------------	--

## B. Project Management Methodology

DEO will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure DEO's satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. DEO believes strong project management is critical throughout the life of any successful project.

For this project, DEO's project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from DEO within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the DEO Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- DEO's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

DEO believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

## VI. *Business Process Organizational Change Management Plan*

This project intends to improve the delivery, execution, security, or convenience of DEO's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Program-wide Organizational Change Management Plan
- Organizational Change Readiness Assessment
- Change Impact Analysis
- Communications Plan
- Change Champion Network
- Training Plan
- Change Management Metrics
- Post-implementation Support Plan

**VII. Project Risk Management Plan**

<b>Risk Description/Impact</b>	<b>Probability of Occurrence (high, medium, low)</b>	<b>Risk Tolerance (high, medium, low)</b>	<b>Mitigation Strategy</b>	<b>Assigned Owner</b>
1. Testing of individual components by vendors prior to integration	Medium	Medium	Review vendor testing plans early and provide input. Verbiage added to SOW for tool vendors to completely and accurately test individual prior to integration.	Joe Lombardi
2. DEO Standards not being followed	Low	Low	Apply quality measures identified in the SSI PMP to ensure compliance. Develop SOPs to make sure standards are followed.	Joe Lombardi
3. Confusion regarding roles			Walk through roles at start of project and remove any ambiguity. Add roles to Scopes of Work.	Joe Lombardi
4. Possibility of inadequate interfaces/standards	Medium	Medium	Utilization of Peraton tools and templates to expose dependencies and mitigate early. API JAD Sessions being conducted by TCS with Peraton participation.	Joe Lombardi
5. Vendor Test Plans	High	Medium	Review test plans for areas of ambiguity prior to testing.	Joe Lombardi

<b>Risk Description/Impact</b>	<b>Probability of Occurrence (high, medium, low)</b>	<b>Risk Tolerance (high, medium, low)</b>	<b>Mitigation Strategy</b>	<b>Assigned Owner</b>
7. Integration Timelines	Low	High	Assess once the CX/UX tool has been selected. Individual project schedules are being integrated into the CX/UX project schedule.	Joe Lombardi
8. Lack of a Test Manager to coordinate testing activities	High	High	SSI to provide another Test Manager resource	Joe Lombardi
9. Testing Defects			Working with DEO, Tools Vendor on a plan for how defects can be resolved, retested and implemented back into the testing environment without impacting current testing	Sushma Kavarthapu
10. UAT Use Cases not aligned to the CX/UX Phase 1a Implementation	High	High	Work with Tools vendor to make sure Personas between the two system designs must be mapped. Phase 1a Use Cases are being identified.	Joe Lombardi
11. Missing Test Cases	High	High	SSI Test team to work with SME Resources on strategies to quickly build missing test cases.	Joe Lombardi
12. Testing Environments	High	High	Create a detailed strategy for utilizing the testing environment structures to show who will use what environments, where the testing data will come from, process for refresh and for promotion of changes throughout the environments up to UAT and Production.	Joe Lombardi

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
13. New Dependencies in the testing and integration task	High	High	Work with CX/UX Project Team to identify dependencies between the CX/UX, TCS and SSI project schedules	Joe Lombardi, Monique Emmanuel

### VIII. Capacity Plan

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

#### Project Capacity Planning

- Establish Cross-Functional Team: To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- Calculate Resource Capacity: Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- Determine Resource Requirements: For each project, look at the scope and what resources are required to do the task for the project.
- Project Prioritization: Via a weighted scoring model used for RA Mod, projects within the program have been prioritized for the purpose of optimizing resources and time.
- Allocate Resources Based on Project Priority: Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- Keep the Lines of Communications Open: Communicate between executives, project management leaders and stakeholders.
- Document Known Risks: Monitor risks such as union strikes, weather, government regulations that stop a project or create new ones unexpectedly.
- Plan for How to Handle Not enough Capacity: Understand that obtaining new needed resources takes time and advance planning is imperative.



**OPERATIONAL WORK PLAN  
FOR  
CUSTOMER EXPERIENCE / USER  
EXPERIENCE (CX/UX)**

**FLORIDA DEPARTMENT OF ECONOMIC OPPORTUNITY  
DIVISION OF INFORMATION TECHNOLOGY  
AND  
DIVISION OF WORKFORCE SERVICES**

**FISCAL YEAR 2022-2023  
QUARTER 4  
PREPARED ON 05/01/2023**

**TABLE OF CONTENTS**

**SECTION 1 — OVERALL PROJECT PLAN ..... 3**

**I. PROJECT CHARTER ..... 3**

A. SCOPE STATEMENT ..... 3

B. PROJECT OBJECTIVES AND BUSINESS BENEFITS ..... 4

C. CRITICAL SUCCESS FACTORS ..... 4

D. KEY DATES ..... 5

E. MAJOR DELIVERABLES ..... 5

F. MAJOR MILESTONES ..... 6

G. KEY STAKEHOLDERS ..... 7

H. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS ..... 7

**II. WORK BREAKDOWN STRUCTURE ..... 8**

**III. RESOURCE LOADED PROJECT SCHEDULE ..... 9**

**IV. PROJECT SPENDING PLAN ..... 10**

**V. PROJECT ORGANIZATION AND METHODOLOGY ..... 10**

A. PROJECT ORGANIZATIONAL CHART ..... 10

B. PROJECT ROLES AND RESPONSIBILITIES ..... 11

C. PROJECT MANAGEMENT METHODOLOGY ..... 14

**VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN ..... 15**

**VII. PROJECT RISK MANAGEMENT PLAN ..... 15**

**VIII. CAPACITY PLAN ..... 16**

## SECTION 1 — OVERALL PROJECT PLAN

### *I. Project Charter*

The Incremental Customer Experience/User Experience (CX/UX) Mobile-Responsive Transformation project will provide a mobile-responsive user interface for employers and Reemployment Assistance claimants that includes plain-language translation across all external-facing screens. The CX/UX project will help the Department achieve the following goals:

1. Improve access and equity in the delivery of Reemployment Assistance benefits.
2. Improve information flow with claimants, employers, and TPAs to make quicker decisions.
3. Leverage new technologies to improve claimants, employers, and TPAs' overall experience with the Reemployment Assistance program, including reducing the amount of time it takes to file a claim for benefits.
4. Enhance System usability including accessibility.
5. Reduce maintenance and support time and costs.

### **A. Scope Statement**

#### **In Scope**

##### **Incremental CX/UX Core:**

- To implement a stand-alone Commercial-Off-The-Shelf (COTS) solution for the external-facing CX/UX screens of the System.
- Phase 1a is focused on claimant screens (excluding appeals) only.
- All appropriated, budgeted, and approved tasks necessary to implement the CX/UX solution.
- Build upon information and deliverables gleaned from the Business Process Optimization (BPO) Project.
- Subsequent transition to Application maintenance & Support.
- The solution will interface with the System for Unemployment Insurance (UI) data and retrieve/submit data necessary for UI external users to perform actions.
- The solution will support data intake from customers even if the System is down and will sync up later when the System is available.

#### **Out of Scope**

##### **Incremental CX/UX Core:**

- Any work associated with modifications to staff screens or back-office workflows.
- Any work associated with appeals and Employers and TPAs will be conducted in subsequent phases outside of RA Modernization.
- Trade Readjustment Assistance, Trade Adjustment Assistance, and Employers and TPAs will be addressed in subsequent phases. As a result, the scope is being changed to only include the claimant screens.

**In Scope**

**COMMS Plain Language, Branding, and Public Relations:**

- Information directed at claimants will be simplified into “plain language” on System screens (excluding appeals); external-facing messages; forms; handbooks, guides, and FAQs; Website content; rationales and rationale templates. This information will also be translated into Spanish and Haitian Creole.
- After June 30, 2023, as part of ongoing modernization efforts, further information will be simplified into “plain language” and then translated into Spanish and Haitian Creole. For claimants, that information is system screens for claimant appeals. For employers and third-party administrators (TPAs), that information is handbooks, guides, and FAQs; forms; and Website content.
- A new name and logo for the System and a new brand manual.
- Public relations materials and an outreach campaign.

**Out of Scope**

**COMMS Plain Language, Branding, and Public Relations:**

- Any work that is not specifically listed as “in scope.”
- Any work that is not appropriated, budgeted, and approved.
- Any work that is already addressed by the Core project.

**B. Project Objectives and Business Benefits**

Project Objective	Business Benefit
<p>An agile and incremental approach will be utilized to ensure that business process optimization (BPO) is incorporated into the transformation activities for each of the four functional modules within scope of the CX/UX project.</p>	<ol style="list-style-type: none"> <li>1. Ensuring that business process improvements are documented prior to determining functional system change needs.</li> <li>2. Ensuring that business requirements align with functional and CX/UX requirements before initiating transformation.</li> <li>3. Ensuring that appropriate work and resource estimates are determined prior to submitting an updated IV-B.</li> <li>4. Improved stability, reliability, and maintainability of the System.</li> <li>5. Improved Reemployment Assistance service to Florida Citizens.</li> <li>6. Predictable maintenance cost for the application.</li> </ol>

**C. Critical Success Factors**

- A suitable COTS solution can be procured which meets the requirements and constraints of the CX/UX Project.
- A contractor can complete the project by 6/30/2023.

- Multiple vendors: CXUX-Incremental, CXUX-Plain Language, and CXUX-Oversight can coordinate and successfully navigate the flow of information amongst themselves and DEO.

**D. Key Dates**

Key Dates (anticipated)	Importance and Relevance to the Project
10/2022	RFI Released for Procurement of Vendor and COTS Product
2/2023	Vendor Award

**E. Major Deliverables**

By 6/2023	Implementation of CX/UX solution - Vendor will design, develop, and implement the solution which meets the contract, requirements, and constraints.
By 6/2023	<p><b>Vendor Deliverables</b></p> <p><b>CX/UX Incremental</b></p> <p>Deliverable 1 – Project Kick-Off Meeting</p> <p>Deliverable 2 – Project Management Plan and Transition Plan</p> <p>Deliverable 3 – Project Schedule</p> <p>Deliverable 4 – Staffing Plan</p> <p>Deliverable 5 – Business Continuity Plan</p> <p>Deliverable 6 – Infrastructure Report</p> <p>Deliverable 7 – Performance Requirements</p> <p>Deliverable 8 – Joint Application Development Sessions</p> <p>Deliverable 9 –Requirements Report</p> <p>Deliverable 10 – Requirements Management Plan</p> <p>Deliverable 11 – Design Specifications Document</p> <p>Deliverable 12 – Detailed Technology Projects Screen and Design Document</p> <p>Deliverable 13 – System Architecture and Design Document</p> <p>Deliverable 14 – Interface Design Description and Integration Specification Document</p> <p>Deliverable 15 – Interface Control Document</p> <p>Deliverable 16 – Architectural Review Document</p> <p>Deliverable 17 – Data Conversion Strategy Document</p> <p>Deliverable 18 –</p> <p>Deliverable 19 – Reemployment Assistance Interfaces</p> <p>Deliverable 20 – Continuous Modernization Strategic Roadmap</p> <p>Deliverable 21 – Installation and Configuration Plan</p> <p>Deliverable 22 – Migration Strategy</p> <p>Deliverable 23 – Testing Plan</p> <p>Deliverable 24 – Test Results Report</p> <p>Deliverable 25 – Operational Readiness Test Plan and Schedule</p>

	Deliverable 26 – Lessons Learned Document
	Deliverable 31 – (specific to SOA/API project)
	Deliverable 32 – Provide a Mobile-Responsive User Interface
	<b>CX/UX – Comms - Plain Language &amp; Branding</b>
	Deliverable 1 – Project Kick-Off Meeting
	Deliverable 2 – Project Management Plan and Transition Plan
	Deliverable 3 – Project Schedule
	Deliverable 4 – Screen Design Sessions
	Deliverable 5 – System Brand Manual
	Deliverable 6 – Plain Language Development and Translation

**F. Major Milestones**

Major Milestone	Milestone Description
Procurement Phase Complete	In progress
Initiation Phase Complete	Completed
Planning Phase Complete	In progress
Execution Phase Complete	In progress
Monitor and Controlling Phase Complete	In progress
Closing Phase Complete	

## G. Key Stakeholders

Key Stakeholder	Project Interest
Meredith Ivey	Acting Secretary, Department of Economic Opportunity
Jason McCandless	Interim Deputy Secretary, Division of Workforce Services
Domenic DiLullo	Chief Technology Officer
Paul Forrester	Chief Information Officer
Allyce Moriak	Chief Financial Officer
Lindsay Volpe	Director of Economic Accountability and Transparency
Wendy Castle	RA Modernization Program Owner – Business
Nicole Sanislow	RA Modernization Program Manager – Business
Tom Richardson	RA Modernization Program Manager – Strategic Planning Office
Garrick Wright	RA Modernization Program Manager – Information Technology
Mark Miller	Project Owner
Nicholas Kaoudis	Project Manager (Core)
Jim Sparks	Project Manager (Core)
Sandeep Aggarwal	Project Manager (Core)
Anthony Perna	Project Manager (Core)
Todd Dzicek	Project Manager Specialist/Business Analyst
Daniel Swaisgood	Project Manager Specialist/Business Analyst
Thomas Hoverman	Organizational Change Management Lead
Christian Stephens	Project Manager (Comms Plain Language, Branding, and Public Relations)
Rose Hebert	Public Relations Manager
Karmyn Hill	Office of Accountability and Transparency
Samantha Caban	Manager, Self Service Team
Jamie Dattoli	Chief of RA Appeals
Johnathan Hill	Chief of RA Adjudication

## H. Significant Project Assumptions and Constraints

### Project Assumptions

- The project will have access to the appropriate state management, staff, and related Program stakeholders (internal and external) and other resources as required and as needed without delay.
- A suitable COTS solution can be procured which meets the requirements of the CX/UX project.
- A contractor can complete the project by 6/30/2023.

### Project Constraints

- End date of 6/30/2023 cannot be moved.
- Must be a COTS product.

## II. Work Breakdown Structure

WBS	Task Name
1	▾ Customer Experience / User Experience (CX/UX)
1.1	▸ Initiation
1.2	Initiation Phase complete
1.3	▸ Planning
1.4	Planning Phase complete
1.5	▾ Execution
1.5.1	▾ CX/UX
1.5.1.1	▸ Procurement
1.5.1.2	▸ Vendor Onboarding
1.5.1.3	Hire additional Staff Aug resources
1.5.1.4	▸ Vendor Deliverables
1.5.1.5	▸ Discovery Phase
1.5.1.6	▸ RTM Program Integration (execution)
1.5.1.7	▸ Design Phase
1.5.1.8	▸ Deployment
1.5.1.9	▸ Development
1.5.1.10	▸ Testing
1.5.1.11	▸ Implementation
1.5.1.12	▸ Training
1.5.1.13	▸ Conduct Lessons Learned Meeting
1.5.2	▾ Plain Language (Beacon)
1.5.2.1	▸ Procurement
1.5.2.2	▸ Vendor Onboarding
1.5.2.3	▸ Vendor Deliverables
1.5.3	▾ Oversight (KPMG)
1.5.3.1	▸ Procurement
1.5.3.2	▸ Vendor Onboarding
1.5.3.3	▸ Deliverable 7 – Project Schedule
1.5.3.4	▸ Deliverable 8 – Screen Design Sessions
1.6	Execution Phase complete
1.7	▾ Monitoring and Controlling
1.7.1	▸ Manage Project Constraints, Proj Spec Prog Issues, Change Control
1.7.2	▸ Vendor Monitoring
1.7.3	▸ Conduct Lessons Learned Meeting
1.8	Monitoring and Controlling Phase Complete
1.9	▸ Project Closeout
1.10	Closeout Phase complete

### III. Resource Loaded Project Schedule

WBS	Task Name	Duration	% Complete	Start	Finish
1	Customer Experience / User Experience (CX/UX)	500 days?	40%	Wed 2/2/22	Tue 1/2/24
1.1	Initiation	56 days	100%	Fri 8/5/22	Fri 10/21/22
1.2	Initiation Phase complete	0 days	100%	Mon 10/31/22	Mon 10/31/22
1.3	Planning	177 days	100%	Mon 6/27/22	Tue 2/28/23
1.3.1	Project Documentation	177 days	100%	Mon 6/27/22	Tue 2/28/23
1.4	Planning Phase complete	0 days	100%	Tue 2/28/23	Tue 2/28/23
1.5	Execution	394 days?	41%	Mon 6/27/22	Fri 12/29/23
1.5.1	CX/UX - Core - (Phase @ L5)	394 days?	30%	Mon 6/27/22	Fri 12/29/23
1.5.1.1	Core - Master Schedule Milestones (under development)	146.75 days?	0%	Mon 3/6/23	Tue 9/26/23
1.5.1.2	Procurement	165 days	100%	Mon 6/27/22	Fri 2/10/23
1.5.1.3	Vendor Onboarding (@4/27/23)	44 days	72%	Fri 2/10/23	Thu 4/13/23
1.5.1.4	Strat/TCS Focus Areas (status in progress)	184 days?	11%	Fri 2/10/23	Thu 10/26/23
1.5.1.5	Strat/TCS Contract Deliverables (@4/27/23)	153.25 days?	36%	Mon 1/16/23	Thu 8/17/23
1.5.1.6	DEO	302 days?	28%	Wed 11/2/22	Fri 12/29/23
1.5.1.7	SSI (@4/28/23)	146.75 days?	34%	Mon 3/6/23	Tue 9/26/23
1.5.2	CX/UX - Core - FINISH	67.25 days	0%	Tue 9/26/23	Fri 12/29/23
1.5.2.1	Phase 1a	0 days	0%	Tue 10/24/23	Tue 10/24/23
1.5.2.2	Phase 1b	0 days	0%	Tue 9/26/23	Tue 9/26/23
1.5.2.3	Phase 1c	0 days	0%	Fri 12/29/23	Fri 12/29/23
1.5.3	CX/UX-Comms	374 days	66%	Mon 6/27/22	Thu 11/30/23
1.5.3.1	Vendor Procurement	151.5 days	100%	Mon 6/27/22	Tue 1/24/23
1.5.3.2	Vendor Onboarding	35.13 days	100%	Wed 1/11/23	Wed 3/1/23
1.5.3.3	Vendor Deliverables	232 days	55%	Tue 1/10/23	Thu 11/30/23
1.5.3.4	Comms Execution Phase complete	0 days	0%	Thu 11/30/23	Thu 11/30/23
1.6	Execution Phase complete	67.25 days	0%	Tue 9/26/23	Fri 12/29/23
1.6.1	Phase 1a	0 days	0%	Thu 11/30/23	Thu 11/30/23
1.6.2	Phase 1b	0 days	0%	Tue 9/26/23	Tue 9/26/23
1.6.3	Phase 1c (temp hard constraint)	0 days	0%	Fri 12/29/23	Fri 12/29/23
1.7	Monitoring and Controlling	497 days?	1%	Wed 2/2/22	Thu 12/28/23
1.8	Monitoring and Controlling Phase Complete	130 days	0%	Fri 6/30/23	Thu 12/28/23
1.9	Project Closeout (PM)	217 days	0%	Mon 3/6/23	Tue 1/2/24
1.10	Closeout Phase complete	0 days	0%	Tue 1/2/24	Tue 1/2/24

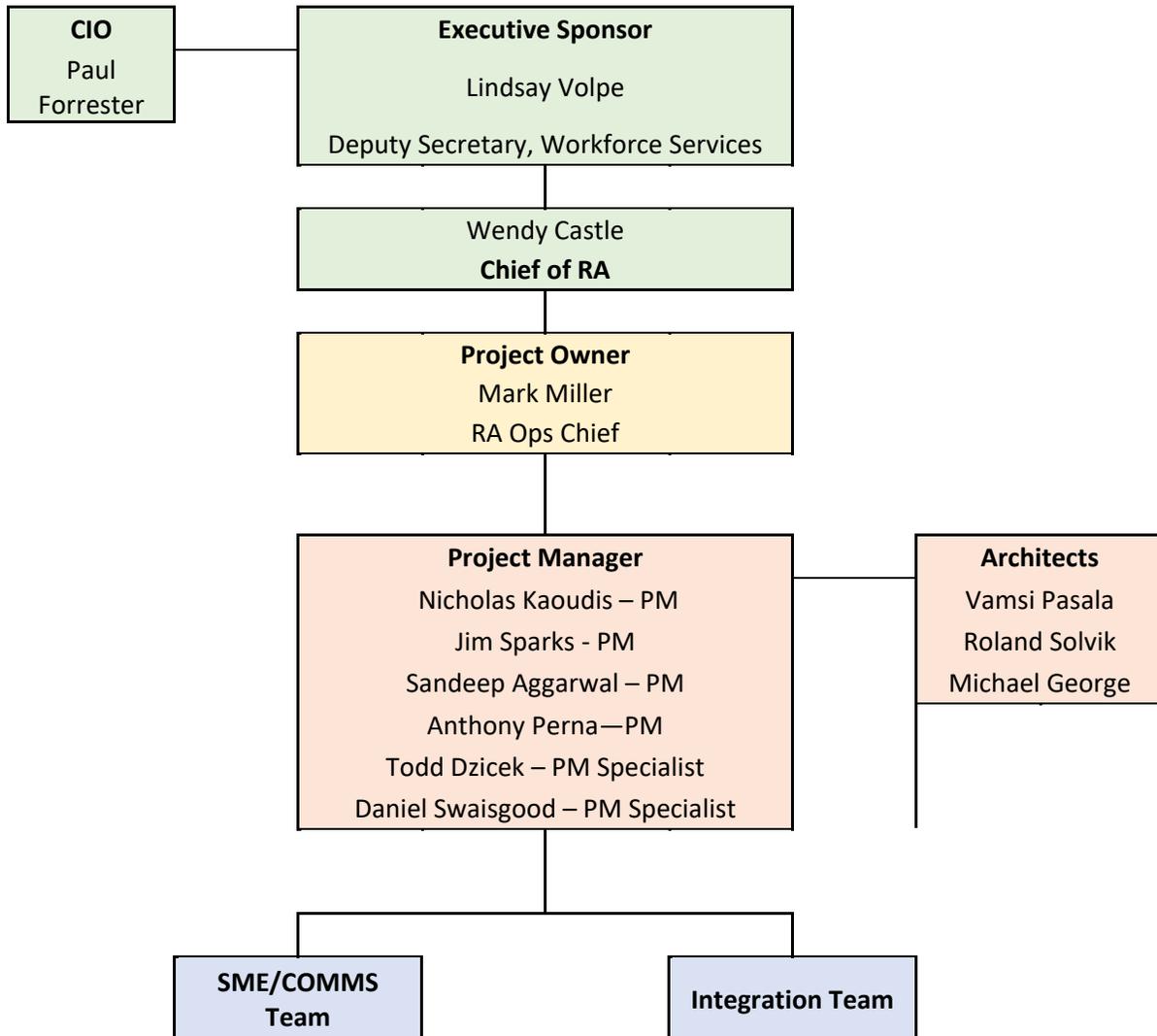
**IV. Project Spending Plan**

FY 2021-22 Expenditures	FY 2022-23 Expenditures
Software: \$0.00	Software: \$563,080.21
Other OpEx (Vendor Deliverables): \$0.00	Other OpEx (Vendor Deliverables): \$7,268,076.13
Other CapEx: \$0.00	Other CapEx: 0.00

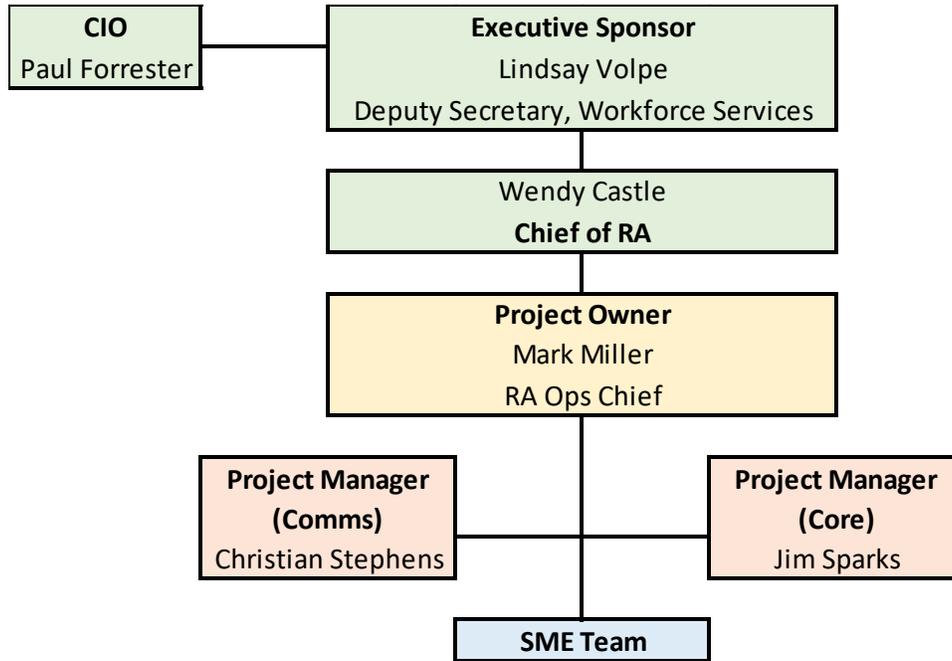
**V. Project Organization and Methodology**

**A. Project Organizational Chart**

**Incremental CX/UX Core:**



**Incremental CX/UX COMMS:**



**B. Project Roles and Responsibilities**

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> <li>• Provide guidance on overall strategic direction</li> <li>• Advising the Strategic Planning Office and project manager of risks that may impact the project</li> <li>• Facilitate resolution of significant issues in the project</li> <li>• Reviewing and signing off on key milestones</li> </ul>
Domenic DiLullo	CTO	<ul style="list-style-type: none"> <li>• Provide guidance on overall strategic direction</li> <li>• Advising the Strategic Planning Office and project manager of risks that may impact the project</li> <li>• Facilitate resolution of significant issues in the project</li> <li>• Reviewing and signing off on key milestones</li> </ul>
Wendy Castle	Chief of RA	<ul style="list-style-type: none"> <li>• Provide guidance on overall strategic direction</li> </ul>

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> <li>• Advising the Strategic Planning Office and project manager of risks that may impact the project</li> <li>• Facilitate resolution of significant issues in the project</li> <li>• Reviewing and signing off on key milestones</li> </ul>
Mark Miller	Project Owner/Director of Reemployment Assistance Operations	<ul style="list-style-type: none"> <li>• Contributes subject matter expertise</li> <li>• Assists the Project Managers in responding to risks and issues</li> <li>• Assists the Project Manager in evaluating change requests</li> <li>• Reviews deliverables and project documents, identifying any deficiencies</li> <li>• Reviews and approves deliverables</li> <li>• Reviews and approves RFCs</li> </ul>
Sandeep Aggarwal	Lead Project Manager (Core)  Project Manager (Core)  Project Manager (Core)	<ul style="list-style-type: none"> <li>• Manages all aspects of the project and ensures compliance with project plan</li> <li>• Monitors project progress and schedule adherence</li> <li>• Completes all documents related to the project</li> <li>• Identifies and manages risks according to the project plan</li> </ul>
Christian Stephens	Project Manager (Comms)	<ul style="list-style-type: none"> <li>• Manages all aspects of the project and ensures compliance with the project management plan</li> <li>• Monitors project progress and schedule adherence</li> <li>• Identifies and manages risks according to the project management plan</li> <li>• Manages vendor deliverables and schedule adherence</li> </ul>
Vamsi Pasala Roland Solvik Michael George	Architect and Technical Lead	<ul style="list-style-type: none"> <li>• Responsible for assisting the team in finding solutions to issues elevated to him</li> <li>• Is available to project sponsors for technical questions regarding direction of the project and any dependencies/impacts of other projects</li> <li>• Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team.</li> </ul>

Name	Project Role	Responsibility
Todd Dzicek Daniel Swaisgood	Project Manager Specialists/Business Analysts	<ul style="list-style-type: none"> <li>• Facilitates the documentation and transfer of information between the vendor and business unit.</li> <li>• Organizes documentation and information for review and reporting.</li> <li>• Assists the project manager in maintaining schedules and deliverables.</li> <li>• Communicates with business units and SMEs to ensure timeliness and completeness of deliverables</li> </ul>
SME Team (Core)	Subject Matter Expert(s)	<ul style="list-style-type: none"> <li>• Process development tasks</li> <li>• Contributes subject matter expertise</li> <li>• Complete assigned project tasks in accordance with the Project Schedule</li> <li>• Identifies risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP</li> <li>• Assists the Project Managers in responding to risks and issues</li> <li>• Assists the Project Manager in evaluating change requests</li> </ul>
Review Team (Core)	Documentation Reviewers	<ul style="list-style-type: none"> <li>• Reviews documentation when submitted by Vendor</li> <li>• Contributes subject matter expertise</li> <li>• Completes assigned project tasks in accordance with the Project Schedule</li> <li>• Identifies risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP</li> <li>• Assists the Project Managers in responding to risks and issues</li> <li>• Assists the Project Manager in evaluating change requests</li> </ul>
Vendor	Strategic Planning Office (SPO)	<ul style="list-style-type: none"> <li>• Monitors project progress</li> <li>• Facilitates DEO Leadership Team Governance meetings</li> <li>• Provides guidance and support to project manager and project team members</li> </ul>
Vendor	User Interface Experts	<ul style="list-style-type: none"> <li>• Provides expertise with creating/customizing UI screens for CX/UX application.</li> </ul>

Name	Project Role	Responsibility
Lindsay Volpe Karmyn Hill	Accountability and Transparency Experts	<ul style="list-style-type: none"> <li>• Provide expertise with project management and guidance.</li> <li>• Provide expertise with public accountability and transparency.</li> </ul>
Rose Hebert	Communications Expert	<ul style="list-style-type: none"> <li>• Provides expertise with public communications.</li> </ul>
Mark Miller	Project Owner	<ul style="list-style-type: none"> <li>• Provides executive oversight and guidance.</li> </ul>
Vendor	Plain Language and Branding	<ul style="list-style-type: none"> <li>• Provides expertise with simplifying all in-scope information via a “plain language” process.</li> <li>• Manages the translation of simplified information into Spanish and Haitian Creole.</li> <li>• Provides expertise with creating new branding guidelines, including a new name and logo for Connect.</li> </ul>
Vendor	Oversight	<ul style="list-style-type: none"> <li>• Provides expertise with the scope of the project as it applies to Florida law.</li> </ul>
Vendor	Public Relations	<ul style="list-style-type: none"> <li>• Provides expertise with creating public relations materials and an outreach campaign.</li> </ul>

**C. Project Management Methodology**

DEO will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure DEO’s satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. DEO believes strong project management is critical throughout the life of any successful project.

For this project, DEO’s project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from DEO within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the DEO Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.

- DEO’s project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone’s role in the project, and clear delineation of responsibilities.

DEO believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

## ***VI. Business Process Organizational Change Management Plan***

This project intends to improve the delivery, execution, security, or convenience of DEO’s lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Stakeholder identification and engagement plans
- Process identification and improvement plans
- Educational assessment and training plans
- Change risk assessment
- Change Advocate networks
- Change Management
- Business Relationship Management
- IT Service Management

## ***VII. Project Risk Management Plan***

<b>Risk Description/Impact</b>	<b>Probability of Occurrence (high, medium, low)</b>	<b>Risk Tolerance (high, medium, low)</b>	<b>Mitigation Strategy</b>	<b>Assigned Owner</b>
Hurricane impacting the state delays the schedule	Medium	High	Adjust schedule accordingly	PM
Divisional and/or Bureau resistance of new process	Medium	Medium	Involve management and impacted staff throughout engagement to increase adoption rate	PM

<b>Risk Description/Impact</b>	<b>Probability of Occurrence (high, medium, low)</b>	<b>Risk Tolerance (high, medium, low)</b>	<b>Mitigation Strategy</b>	<b>Assigned Owner</b>
			and ensure a successful transition	
Insufficient knowledge transfer of new process	Medium	Medium	Involve impacted staff throughout engagement to increase participation and knowledge of new processes	PM
Identified technical solutions do not address requirements	Low	Medium	Procure necessary solution(s)	SME/ Implementation Teams, Owner
Procurement(s) are outside of available budget.	Low	Medium	Identify alternative solutions, seek additional funding	SME Team, Owner
Resource requirements for execution of roadmap are beyond original expectations.	Medium	Medium	Prioritize highest-risk access flows, adjust schedule, plan additional phases.	PM/SME
Procurement Delays for CX/UX	High	Medium	Communication with Senior Leadership and Procurement Team(s).	PM/Project Owner/Senior Leadership

### ***VIII. Capacity Plan***

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

#### **Project Capacity Planning**

- Establish Cross-Functional Team: To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- Calculate Resource Capacity: Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- Determine Resource Requirements: For each project, look at the scope and what resources are required to do the task for the project.
- Prioritize Projects: Which projects are most important, and which can be put aside for the time being? You can't do everything at once.

- Allocate Resources Based on Project Priority: Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- Keep the Lines of Communications Open: Communicate between executives, project management leaders and stakeholders.
- Document Known Risks: Monitor risks such as weather, government regulations that stop a project or create new ones unexpectedly.
- Plan for How to Handle Too Much Capacity: Understand where it is and how to resolve it (such as reassigning), or not enough capacity (again, where/how).



# **OPERATIONAL WORK PLAN FOR ARCHIVE & PURGE**

**FLORIDA DEPARTMENT OF ECONOMIC OPPORTUNITY  
DIVISION OF INFORMATION TECHNOLOGY  
AND  
DIVISION OF WORKFORCE SERVICES**

**FISCAL YEAR 2022-2023**

**QUARTER 4**

PREPARED ON 04/30/2023

**TABLE OF CONTENTS**

**SECTION 1 — OVERALL PROJECT PLAN ..... 3**

**I. PROJECT CHARTER..... 3**

- A. SCOPE STATEMENT ..... 3
- B. PROJECT OBJECTIVES AND BUSINESS BENEFITS ..... 3
- C. CRITICAL SUCCESS FACTORS ..... 4
- D. KEY DATES ..... 4
- E. MAJOR DELIVERABLES ..... 5
- F. MAJOR MILESTONES ..... 6
- A. KEY STAKEHOLDERS ..... 6
- B. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS ..... 7

**II. WORK BREAKDOWN STRUCTURE ..... 7**

**III. RESOURCE LOADED PROJECT SCHEDULE ..... 9**

**IV. PROJECT SPENDING PLAN ..... 11**

**V. PROJECT ORGANIZATION AND METHODOLOGY ..... 12**

- A. PROJECT ORGANIZATIONAL CHART ..... 12
- B. PROJECT ROLES AND RESPONSIBILITIES ..... 12
- C. PROJECT MANAGEMENT METHODOLOGY ..... 14

**VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN ..... 15**

**VII. PROJECT RISK MANAGEMENT PLAN ..... 15**

**VIII. CAPACITY PLAN ..... 16**

## SECTION 1 — OVERALL PROJECT PLAN

### *I. Project Charter*

The Department of Economic Opportunity (DEO) is seeking a solution for managing the complexity of data growth within the Reemployment Assistance Claims and Benefits Information System.

Managing the complexity of data growth calls for a data growth management strategy, including determining the optimal profile or size for the database (current transactional database is 20TB); monitoring disk space usage, hardware resources, and database performance; understanding growth management challenges and testing strategies; and understanding space management.

Formal structures and strategies for managing data, archiving data, and purging data enables the Department to better ensure the availability, security, and integrity of the System.

#### **A. Scope Statement**

The Archive & Purge project team will use existing state and federal criteria to find a solution that will allow DEO to selectively archive and purge Reemployment Assistance data from the online System.

##### **In Scope**

- Request for Information (RFI): A request for information will be published to invite vendors to provide potential strategies for data growth management.
- Requirements gathering, both high level and detailed are in scope for this project.

##### **Out of Scope**

- Data Governance: Data Governance is an enterprise level effort, and therefore, is out of scope for this project per Change Request CR 14.
- Records Management: Records Management Policy updating is an enterprise level effort and out of scope per Decision 1185 resolved October 20, 2022.
- Purchasing a solution: The purchase of a solution was deemed out of scope per Change Request CR 14.

#### **B. Project Objectives and Business Benefits**

Since the System went live in 2013, its relational database has been growing exponentially. It is estimated that upwards of 80% of the monthly generated data stored is replicated and is not being used, and that copies of these large volumes of data continue to consume more and more space. The consumption of space and an absence of an archival and purge process has degraded System performance and increased batch processing windows and operational and maintenance costs.

The success of DEO's archival and purge process is dependent on improvements to the System's data management and operational schema. The data contained in that schema is

data vital to the operation of the System; however, some of this data can be archived. This initiative invites vendors to assist DEO in determining if an archiving and purging tool will work with DEOs existing technology, if a tool and customization is required, or if a custom tool must be developed.

Project Objective	Business Benefit
Detailed business rules* for the data to be archived or purged will be identified	Determining what data is eligible to archived or purged, and on what schedule
Determine if a suitable archive and purge tool exists	DEO will be able to develop an implementation plan for the archival or purging of appropriate data

*(Note: Business Rules rather than requirements will be delivered because they are system independent and do not preclude vendors from proposing solutions. Business requirements will be created when a specific tool is selected, since business requirements are directly linked/tracked during solution testing.)*

### C. Critical Success Factors

The following factors are necessary to determine the correct path to managing data growth at DEO.

- Identify if a solution exists for a data management strategy; if a custom solution is necessary; or if a solution and services are required.
- Provide a list of business rules and technical requirements that DEO must follow in archiving and purging data.
- Identify any risks DEO must consider moving forward with a solution.
- Identify a potential plan and future path as part of continuous improvement.

### D. Key Dates

The key dates below represent two critical paths; the path to publishing a Request for Information (RFI) with high level requirements, and a path for collecting detailed business rules that further define DEO’s data and current locations. The detailed business rules assist in mapping of the data for transition to an archival environment, and for purging of data according to state and federal law and DEO policy.

Key Date	Importance and Relevance to the Project
February 6 – June 29, 2023	Record Level Detail Requirements Gathering Completed
May 12 – June 9, 2023	Request for Information Issued
June 9, 2023	Vendor Responses Due
June 26, 2023 – June 30, 2023	Oral Presentations Completed (if any)
June 30, 2023	Request for Information Process Completed
June 19 – June 23, 2023	Plan for Continuous Improvement
June 30, 2023	Requirements Traceability Matrix Completed

## E. Major Deliverables

DEO’s Reemployment Assistance System is made up of a collection of software. Each software package has the potential to contain claimant information that must be mapped for the Archive & Purge project to be successful. Therefore, by opening the door to multiple vendor solutions, the agency will see the latest technology, and will be able to develop a plan for moving forward.

The deliverables mentioned below follow two paths:

1. Publishing of a Request for Information
2. Developing more detailed data information for potential vendors to understand the data structure across multiple applications in the System.

Major Deliverable	Deliverable Description
Project Kickoff Meeting	The PM schedules the project kickoff meeting and provides agenda and materials.
Project Management Plan	The PM provides the final version of the PMP after review and approval by DEO
Request for Information (RFI) Ready for Publication	This Request for Information will allow DEO to see what is available, if anything, in the technology world for archiving and purging—that will work with the System.
Next Steps after publication of the Request for Information (RFI)	The results of the Request for Information will promote discussion between Reemployment Assistance and Information Technology to agree on direction going forward—and on a plan to do so.
Business Rules Traceability Matrix	The BA and PM conduct a series of work sessions to drill down in detail the data mapping that can be used to drive the technical Archive & Purge processes and requirements.
Technical Traceability Matrix	This document, written by developers for developers, will trace claimant data based on elements and types. This, in turn, will be used as a checklist to identify what values a record series must have (or not have) when moving data to archival storage and for setting up for regularly scheduled purging.
Briefing Sheet for Tool Recommendations	As part of the transition into continuous improvement, the project team delivers the Continuous Modernization Plan and corresponding roadmap after review and approval by DEO.
Project Closeout Report	The PM provides the Project Closeout Report

## F. Major Milestones

The project cannot be completed without the milestones listed below. This is a difficult project for DEO’s business units. Transparency and inclusion in all major milestones and deliverables will help build and maintain critical trust in the handling of their valuable data.

Major Milestone	Deliverable Description
Project Kickoff Meeting	The PM schedules the project kickoff meeting and provides agenda and materials.
Project Management Plan	The PM provides the final version of the PMP after review and approval by DEO
Publication of Request for Information	This Request for Information will allow DEO to see what is available, if anything, in the technology world for archiving and purging—that will work with the System.
Negotiation and Agreement on a plan for moving forward per results of the Request for Information publication.	The results of the Request for Information will promote discussion between Reemployment Assistance and Information Technology to agree on direction going forward—and on a plan to do so.
Business Rules Traceability Matrix	The BA and PM conduct a series of work sessions to drill down in detail the data mapping that can be used to drive the technical Archive & Purge processes and requirements.
Technical Traceability Matrix	This document, written by developers for developers, will trace claimant data based on elements and types. This, in turn, will be used as a checklist to identify what values a record series must have (or not have) when moving data to archival storage and for setting up for regularly scheduled purging.
Briefing Sheet for Tools Recommendations	As part of the transition into continuous improvement, the project team delivers the Continuous Modernization Plan and corresponding roadmap after review and approval by DEO.
Project Closeout Report	The PM provides the Project Closeout Report

## A. Key Stakeholders

The stakeholders listed below are critical in providing direction, especially with a project that will have a large amount of discovery. The project sponsors will be valuable when issues that require executive decisions are needed, and when there may be negotiations for keeping and purging older data based on its value.

Key Stakeholder	Project Interest
Meredith Ivey	Acting Secretary, Department of Economic Opportunity

Key Stakeholder	Project Interest
Lindsay Volpe	Deputy Secretary, Workforce Services
Domenic DiLullo	Chief Technology Officer
Paul Forrester	Chief Information Officer
Allyce Moriak	Chief Financial Officer
Wendy Castle	RA Modernization Program Owner – Business
Nicole Sanislow	RA Modernization Program Manager – Business
Tom Richardson	RA Modernization Lead Program Manager – Strategic Planning Office
Thomas Holliday	RA Modernization Program Manager – Strategic Planning Office
Garrick Wright	RA Modernization Program Manager – Information Technology
Timothy Giesecke	Project Owner/Sponsor
Linda Lawler	Project Manager

## B. Significant Project Assumptions and Constraints

### Project Assumptions

1. This project will lead to a Request for Proposal as part of continuous improvement
2. Any modifications to existing records management policies and procedures or record retention rules will be handled outside the scope of the project by Reemployment Assistance and the agency’s legal department.
3. The assigned IT resources possess relevant knowledge and skills to complete the identified tasks.
4. Members of the project team will have access to the necessary tools, hardware, and materials necessary to complete the identified tasks.
5. All relevant stakeholders will attend required status meetings. However, there may be instances where some stakeholders are unavailable to attend.
6. The project sponsor will be responsive and prepared to make decisions regarding the project cost and scope.

### Project Constraints

1. Limited knowledge of table and record level traceability of data throughout the reemployment assistance system due to business units not being exposed at the level expected.
2. Limited knowledge of what is allowed by law and how that compares to what is stored today in the system.
3. Fear of archiving and purging since this is the first time the agency has done so with the Reemployment Assistance System.

## II. Work Breakdown Structure

The Work Breakdown Structure (WBS) below represents the high-level deliverables for the project, from inception (Initiation) to completion (Project Closeout). To avoid duplication, the lower-level work packages are represented with their due dates in Section D. Key Dates.

WBS	Task Name
<b>1</b>	<b>15-DEO-Archive and Purge</b>
<b>1.1</b>	<b>Initiation</b>
<b>1.1.1</b>	<b>Risk and Complexity Assessment</b>
<b>1.1.2</b>	<b>PM Deliverable: Project Charter</b>
1.1.3	Project Charter complete
<b>1.1.4</b>	<b>Stakeholders Register</b>
<b>1.1.5</b>	<b>Project Kickoff Meeting</b>
<b>1.1.6</b>	<b>Conduct Lessons Learned Meeting</b>
1.2	Initiation Phase complete
<b>1.3</b>	<b>Planning</b>
<b>1.3.1</b>	<b>PM Deliverable: Resource Plan</b>
1.3.2	Resource Plan Complete
<b>1.3.3</b>	<b>PM Deliverable: Project Schedule</b>
1.3.4	Project Schedule complete
<b>1.3.5</b>	<b>PM Deliverable: Project Management Plan</b>
1.3.6	Project Management Plan complete
<b>1.3.7</b>	<b>PM Deliverable: Project Budget</b>
1.3.8	Project Budget complete
<b>1.3.9</b>	<b>PM Deliverable: Project Spending Plan</b>
1.3.10	MILESTONE: Project Spending Plan complete
1.3.11	Complete Impact Analysis
<b>1.3.12</b>	<b>Requirements:</b>
1.3.13	Complete the Planning Gate R&C Assessment
<b>1.3.14</b>	<b>Conduct Lessons Learned Meeting</b>
1.4	MILESTONE: Planning Phase complete
<b>1.5</b>	<b>Execution</b>
1.5.1	Review RFI
1.5.2	Approve RFI
<b>1.5.3</b>	<b>Record Level Detail Requirements Gathering Completed</b>
<b>1.5.4</b>	<b>Phase I: RFI Solution Evaluations</b>
<b>1.5.5</b>	<b>Conduct Lessons Learned Meeting</b>
<b>1.5.6</b>	<b>Transition to Operations</b>
1.6	Execution Phase complete
<b>1.7</b>	<b>Monitoring and Controlling</b>
1.7.1	Manage Project Schedule
1.7.2	Manage Project Costs
1.7.3	Manage Project Scope
1.7.4	Manage Project Risks

WBS	Task Name
1.7.5	Manage Project Issues
1.7.6	Manage Decisions
1.7.7	Manage Action Items
1.7.8	Manage Cybersecurity
1.7.9	Conduct Regularly scheduled Status Meetings
1.7.10	Prepare Regularly scheduled Status Reports
1.8	<b>Monitoring and Controlling Phase Complete</b>
1.9	<b>Project Closeout</b>
1.9.1	Schedule Project Closeout Meeting
1.9.2	<b>PM Deliverable: Project Closeout Report</b>
1.9.3	<b>Project Closeout Report complete</b>
1.9.4	Conduct Project Closeout meeting
1.9.5	<b>Conduct Lessons Learned Meeting</b>
1.1	<b>Closeout Phase complete</b>

### III. Resource Loaded Project Schedule

As stated in Section II, Work Breakdown Structure, since this is a high-level representation of the project, the project team names are not reflected. The names are listed in Section V.B. Project Roles and Responsibilities, Project Team.

The project management deliverables mentioned below are required by Florida Administrative Code, Rule 60GG.

WBS	Task Name	% Complete	Duration	Start	Finish
1	<b>15-DEO-Archive and Purge</b>	85%	325 days	Mon 4/4/22	Fri 6/30/23
1.1	<b>Initiation</b>	100%	72 days	Mon 4/4/22	Tue 7/12/22
1.1.1	<b>Risk and Complexity Assessment</b>	100%	59 days	Mon 4/4/22	Thu 6/23/22
1.1.2	<b>PM Deliverable: Project Charter</b>	100%	20 days	Mon 5/16/22	Fri 6/10/22
1.1.3	<b>Project Charter complete</b>	100%	0 days	Fri 6/10/22	Fri 6/10/22
1.1.4	<b>Stakeholders Register</b>	100%	22 days	Mon 6/13/22	Tue 7/12/22
1.1.5	<b>Project Kickoff Meeting</b>	100%	19 days	Mon 6/13/22	Thu 7/7/22
1.1.6	<b>Conduct Lessons Learned Meeting</b>	100%	3 days	Mon 6/13/22	Wed 6/15/22
1.2	<b>Initiation Phase complete</b>	100%	0 days	Wed 6/15/22	Wed 6/15/22
1.3	<b>Planning</b>	100%	224 days	Tue 4/5/22	Fri 2/10/23
1.3.1	<b>PM Deliverable: Resource Plan</b>	100%	132 days	Thu 6/16/22	Fri 12/16/22
1.3.2	<b>Resource Plan Complete</b>	100%	0 days	Fri 12/16/22	Fri 12/16/22
1.3.3	<b>PM Deliverable: Project Schedule</b>	100%	101 days	Wed 7/13/22	Thu 12/1/22
1.3.4	<b>Project Schedule complete</b>	100%	0 days	Thu 12/1/22	Thu 12/1/22
1.3.5	<b>PM Deliverable: Project Management Plan</b>	100%	59 days	Fri 11/4/22	Thu 1/26/23

WBS	Task Name	% Complete	Duration	Start	Finish
1.3.6	<b>Project Management Plan complete</b>	100%	0 days	Thu 1/26/23	Thu 1/26/23
<b>1.3.7</b>	<b>PM Deliverable: Project Budget</b>	<b>100%</b>	<b>13 days</b>	<b>Thu 12/29/22</b>	<b>Mon 1/16/23</b>
1.3.8	<b>Project Budget complete</b>	100%	0 days	Mon 1/16/23	Mon 1/16/23
<b>1.3.9</b>	<b>PM Deliverable: Project Spending Plan</b>	<b>100%</b>	<b>3 days</b>	<b>Tue 1/17/23</b>	<b>Thu 1/19/23</b>
1.3.10	<b>MILESTONE: Project Spending Plan complete</b>	100%	0 days	Thu 1/19/23	Thu 1/19/23
1.3.11	Complete Impact Analysis	100%	1 day	Fri 1/20/23	Fri 1/20/23
<b>1.3.12</b>	<b>Requirements:</b>	<b>100%</b>	<b>156 days</b>	<b>Fri 7/8/22</b>	<b>Fri 2/10/23</b>
1.3.13	Complete the Planning Gate R&C Assessment	100%	1 day	Tue 4/5/22	Tue 4/5/22
<b>1.3.14</b>	<b>Conduct Lessons Learned Meeting</b>	<b>100%</b>	<b>2 days</b>	<b>Mon 1/23/23</b>	<b>Tue 1/24/23</b>
1.4	<b>MILESTONE: Planning Phase complete</b>	100%	0 days	Tue 1/24/23	Tue 1/24/23
<b>1.5</b>	<b>Execution</b>	<b>76%</b>	<b>105 days</b>	<b>Mon 2/6/23</b>	<b>Fri 6/30/23</b>
1.5.1	Review RFI	100%	50 days	Mon 2/13/23	Fri 4/21/23
1.5.2	Approve RFI	100%	0 days	Fri 4/21/23	Fri 4/21/23
1.5.3	Purchasing Review and Adjustments	66%	15 days	Mon 4/24/23	Fri 5/12/23
<b>1.5.4</b>	<b>Record Level Detail Requirements Gathering Completed</b>	<b>83%</b>	<b>100 days</b>	<b>Mon 2/6/23</b>	<b>Fri 6/23/23</b>
<b>1.5.5</b>	<b>Phase I: RFI Solution Evaluations</b>	<b>0%</b>	<b>35 days</b>	<b>Fri 5/12/23</b>	<b>Fri 6/30/23</b>
<b>1.5.6</b>	<b>Conduct Lessons Learned Meeting</b>	<b>0%</b>	<b>2 days</b>	<b>Mon 6/12/23</b>	<b>Tue 6/13/23</b>
<b>1.5.7</b>	<b>Transition to Operations</b>	<b>0%</b>	<b>10 days</b>	<b>Mon 6/19/23</b>	<b>Fri 6/30/23</b>
1.6	<b>Execution Phase complete</b>	0%	0 days	Fri 6/30/23	Fri 6/30/23
<b>1.7</b>	<b>Monitoring and Controlling</b>	<b>83%</b>	<b>266 days</b>	<b>Fri 6/24/22</b>	<b>Fri 6/30/23</b>
1.7.1	Manage Project Schedule	74%	159 days	Mon 8/29/22	Fri 6/30/23
1.7.2	Manage Project Costs	100%	119 days	Tue 1/17/23	Fri 6/30/23
1.7.3	Manage Project Scope	74%	159 days	Mon 8/29/22	Fri 6/30/23
1.7.4	Manage Project Risks	84%	266 days	Fri 6/24/22	Fri 6/30/23
1.7.5	Manage Project Issues	84%	266 days	Fri 6/24/22	Fri 6/30/23
1.7.6	Manage Decisions	84%	266 days	Fri 6/24/22	Fri 6/30/23
1.7.7	Manage Action Items	84%	266 days	Fri 6/24/22	Fri 6/30/23
1.7.8	Manage Cybersecurity	84%	266 days	Fri 6/24/22	Fri 6/30/23
1.7.9	Conduct Regularly scheduled Status Meetings	76%	183 days	Mon 8/1/22	Fri 6/30/23
1.7.10	Prepare Regularly scheduled Status Reports	82%	240 days	Mon 8/1/22	Fri 6/30/23
1.8	<b>Monitoring and Controlling Phase Complete</b>	0%	0 days	Fri 6/30/23	Fri 6/30/23
<b>1.9</b>	<b>Project Closeout</b>	<b>0%</b>	<b>4 days</b>	<b>Mon 6/26/23</b>	<b>Thu 6/29/23</b>
1.9.1	Schedule Project Closeout Meeting	0%	1 day	Mon 6/26/23	Mon 6/26/23

WBS	Task Name	% Complete	Duration	Start	Finish
<b>1.9.2</b>	<b>PM Deliverable: Project Closeout Report</b>	<b>0%</b>	<b>4 days</b>	<b>Mon 6/26/23</b>	<b>Thu 6/29/23</b>
1.9.3	<b>Project Closeout Report complete</b>	0%	0 days	Thu 6/29/23	Thu 6/29/23
1.9.4	Conduct Project Closeout meeting	0%	1 day	Thu 6/29/23	Thu 6/29/23
<b>1.9.5</b>	<b>Conduct Lessons Learned Meeting</b>	<b>0%</b>	<b>1 day</b>	<b>Thu 6/29/23</b>	<b>Thu 6/29/23</b>
1.1	<b>Closeout Phase complete</b>	0%	0 days	Thu 6/29/23	Thu 6/29/23

**IV. Project Spending Plan**

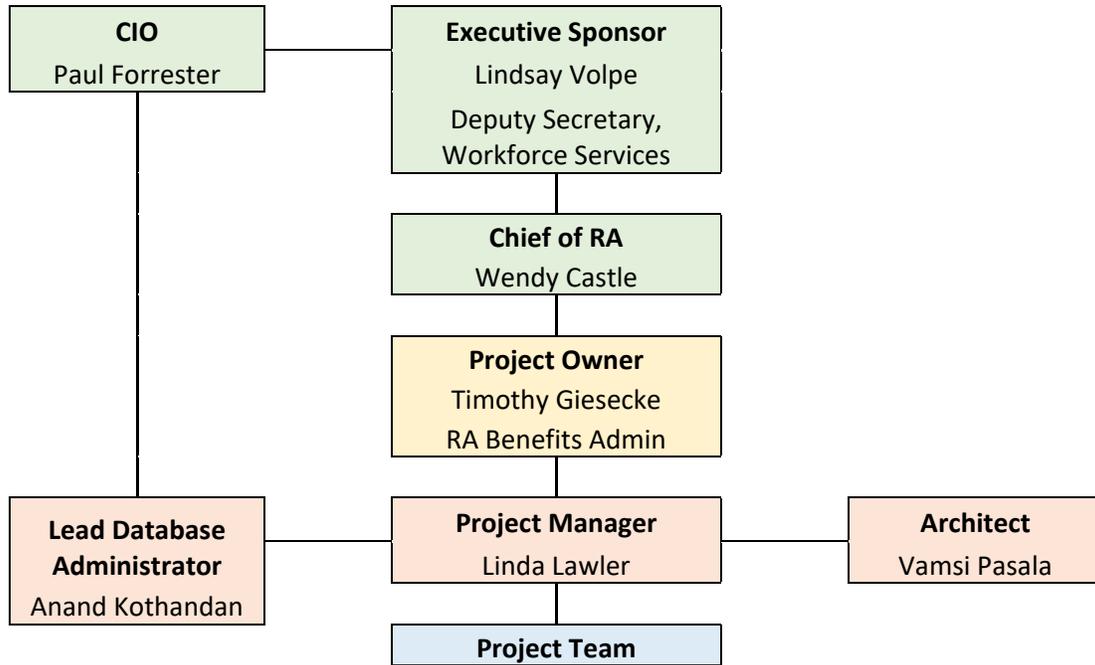
The Archive & Purge project has existing resources assigned, therefore, there is no spend for this project.

<b>FY 2021-22 Expenditures</b>	<b>FY 2022-23 Expenditures</b>
<i>Software: \$0.00</i>	<i>Software: \$0.00</i>
<i>Other OpEx (Vendor Deliverables): \$0.00</i>	<i>Other OpEx (Vendor Deliverables): \$0.00</i>
<i>Other CapEx: \$0.00</i>	<i>Other CapEx: \$0.00</i>

## V. Project Organization and Methodology

### A. Project Organizational Chart

The Project Manager meets with project stakeholders every week on Request for Information, business rules progress, and to answer general status questions. This meeting is also the forum for escalating issues that require all project stakeholders to resolve together.



### B. Project Roles and Responsibilities

The staff mentioned below are instrumental in facilitating the needs of the team so that the project outcome meets expectations.

The project sponsors also work with their direct reports if the team has issues that require elevation.

The Legal and Records Management Liaison works directly with Reemployment Assistance to provide guidance when record series requests may differ from what is allowed legally or by DEO Policy.

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> <li>Provide guidance on overall strategic direction</li> <li>Advising the Strategic Planning Office and project manager of risks that may impact the project</li> </ul>

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> <li>• Facilitate resolution of significant issues in the project</li> <li>• Reviewing and signing off on key milestones</li> </ul>
Paul Forrester	Project Sponsor/Chief Information Officer (CIO)	<ul style="list-style-type: none"> <li>• Responsible for the Strategy of DEO IT</li> <li>• Responsible for Staffing and Support plans</li> <li>• Responsible for day-to-day operations</li> <li>• Responsible for working closely with programs on technology needs</li> </ul>
Wendy Castle	Project Sponsor/Chief of Reemployment Assistance	<ul style="list-style-type: none"> <li>• Provide guidance on overall strategic direction</li> <li>• Advising the Strategic Planning Office and project manager of risks that may impact the project</li> <li>• Facilitate resolution of significant issues in the project</li> </ul>
Timothy Giesecke	Project Owner/RA Benefits Administrator	<ul style="list-style-type: none"> <li>• Represents the interests of the stakeholders to the DW Team</li> <li>• Monitors project progress</li> <li>• Approves project definition</li> <li>• Approves plans and schedules</li> <li>• Validates project deliverables meet expectations</li> <li>• Tracks project benefit recognition, risk retention and mitigation activities</li> <li>• Acts as liaison between teams and Management for issue escalation and resolution</li> </ul>
Linda Lawler	Project Manager	<ul style="list-style-type: none"> <li>• Manages all aspects of the project and ensure compliance with project plan</li> <li>• Monitors project progress and schedule adherence</li> <li>• Completes all documents related to the project</li> <li>• Identifies and manages risks according to the project plan</li> </ul>
Vamsi Pasala	Architect and Technical Lead	<ul style="list-style-type: none"> <li>• Responsible for assisting the team(s) in coordinating the most appropriate solution for archiving and purging based on requirements collected.</li> <li>• Assists the team with identifying integration points with other projects and evaluating any risks.</li> </ul>

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> <li>• Is available to executive management, the program team, and the project team for technical questions regarding direction of the project and any dependencies/impacts of other projects</li> <li>• Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team.</li> <li>• Has historical knowledge of the Connect system since Go Live</li> </ul>
Anand Kothandan	Lead Database Administrator	<ul style="list-style-type: none"> <li>• Responsible for assisting the Enterprise Solution Architect in coordinating the most appropriate solution for archiving and purging based on requirements collected.</li> <li>• Is available to executive management, the program team, and the project team for technical questions regarding direction of the project and any dependencies/impacts of other projects</li> <li>• Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team.</li> <li>• Has years of historical knowledge of the Connect system</li> </ul>
Amit Kanaiyalal, Yella Mopuru Tina Peacock	Project Team	<ul style="list-style-type: none"> <li>• Works with the PM in business unit and IT meetings for requirements gathering</li> <li>• Assists the PM in the creation of the Business and Technical Traceability Matrix.</li> <li>• Assists the PM in the creation of and publication of the Request for Information.</li> </ul>

### C. Project Management Methodology

The path to archiving and purging data requires transparency, excellent communication, and an overall process that supports both.

DEO will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure DEO’s satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. DEO believes strong project management is critical throughout the life of any successful project.

For this project, DEO’s project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from DEO within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the DEO Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- DEO’s project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone’s role in the project, and clear delineation of responsibilities.

DEO believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

**VI. Business Process Organizational Change Management Plan**

This project is one of discovery – finding a path toward a sustainable data management strategy. Discovering this path will not result in any changes to the organization.

**VII. Project Risk Management Plan**

Currently there are no new risks for this project.

Project risks can be raised by anyone on the project. These risks are then entered into the department’s tool where they are discussed during weekly meetings. They are tracked in these meetings until the risk is closed.

Risk meetings, hosted by program management, are attended by sponsors and stakeholders of this project.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1.				
2.				

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
3.				
4.				
5.				

***VIII. Capacity Plan***

This project does not include the purchase of hardware and software; therefore, capacity planning is not necessary in this phase.



**OPERATIONAL WORK PLAN  
FOR  
IDENTITY AND ACCESS MANAGEMENT**

**FLORIDA DEPARTMENT OF ECONOMIC OPPORTUNITY  
DIVISION OF INFORMATION TECHNOLOGY  
AND  
DIVISION OF WORKFORCE SERVICES**

**FISCAL YEAR 2022-2023**

**QUARTER 4**

**PREPARED ON 5/5/2023**

**TABLE OF CONTENTS**

**SECTION 1 — OVERALL PROJECT PLAN ..... 3**

**I. PROJECT CHARTER..... 3**

A. SCOPE STATEMENT ..... 3

THE IAM PROJECT TEAM WILL USE UTILIZE VENDOR RECOMMENDED PROCESSES, PEOPLE, AND  
POLICIES TO STRENGTHEN AND STANDARDIZE EXISTING IAM FOR THE SYSTEM. .... 3

B. PROJECT OBJECTIVES AND BUSINESS BENEFITS ..... 4

C. CRITICAL SUCCESS FACTORS ..... 5

D. KEY DATES ..... 5

E. MAJOR DELIVERABLES ..... 5

F. MAJOR MILESTONES ..... 6

G. KEY STAKEHOLDERS ..... 7

H. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS ..... 7

**II. WORK BREAKDOWN STRUCTURE ..... 8**

**III. RESOURCE LOADED PROJECT SCHEDULE ..... 10**

**IV. PROJECT SPENDING PLAN ..... 12**

**V. PROJECT ORGANIZATION AND METHODOLOGY ..... 12**

A. PROJECT ORGANIZATIONAL CHART ..... 12

B. PROJECT ROLES AND RESPONSIBILITIES..... 12

C. PROJECT MANAGEMENT METHODOLOGY ..... 14

**VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN ..... 15**

**VII. PROJECT RISK MANAGEMENT PLAN ..... 16**

**VIII. CAPACITY PLAN ..... 16**

## SECTION 1 — OVERALL PROJECT PLAN

### *I. Project Charter*

The Department of Economic Opportunity's (DEO) processes for Identity and Access Management (IAM) are not consistently and uniformly applied to all systems, applications, and users, posing confidentiality, integrity, and availability risk to DEO. As a result, the Reemployment Assistance Claims and Benefits Information System (System) Modernization Program Roadmap calls out a need for a comprehensive review and update of the IAM process for the System, particularly in the context of cloud migration, where logical security boundaries are often represented by user access controls rather than physical system delineation and network segregation.

The purpose of this project is to address the need for IAM process improvements to the System in the context of modernization and cloud migration, while considering that IAM processes are, by necessity and design, standard for the agency enterprise, and not system-specific. Therefore, to avoid additional risk to the agency and the System, this project does have dependency with agency efforts to improve IAM across the enterprise.

Additionally, due to the urgency of DEO's need to address widespread fraud and cyber-attacks threatening the System, elements of this project were performed ahead of plan development that encompassed the majority of IAM controls specific to the Reemployment Assistance claimant-to-application access flow. While the work was significant, those components were implemented in such a way to maximize compatibility and prevent re-work for the remainder of the effort.

#### **A. Scope Statement**

The IAM Project Team will use utilize vendor recommended processes, people, and policies to strengthen and standardize existing IAM for the System.

##### **In Scope**

- Processes - The project will involve significant updates to the IAM governance process, including identity creation, modification, and destruction; auditing and alerting; role definition; access authorization; and access provisioning
- People – All IAM process roles involved in governance and execution will be addressed. Governance will require System and Data Owners from the Reemployment Assistance program, as well as subject matter expertise and IT Service Management functions from IT. Execution of the process will impact all users and administrators of the system (including the application and underlying infrastructure), whether they have an account in pre-project state or not. All who interact with the system will be expected to have a uniquely identifiable account protected by an authentication mechanism that provides access to only the data and components of the system and application to which their role(s) are authorized. This includes, but may not be limited to:
  - External users of the application (benefits seekers, employers, partners, etc.)

- Internal users of the application (DEO staff, contractors, privileged partners, etc.)
- Internal IT operational and development staff responsible for the operation and maintenance of the system(s) and their components on which the application relies.
- Program staff or partners responsible for gathering information and/or reporting from components of the system not available through the application.
- External support partners, contractors, etc. that may assist in the operation, maintenance, analysis, auditing, or security response activities associated with the system or application.
- Internal auditors, security staff, or other program support roles.
- System Administrator and Service Accounts.

**Out of Scope**

- Development of any components of the IAM process already addressed by enterprise efforts.
- Development and integration of any applications or systems into the IAM process other than those involved in administering the RA program.

**B. Project Objectives and Business Benefits**

Project Objective	Business Benefit
Implementation of enterprise compatible IAM process for the System.	<ul style="list-style-type: none"> <li>● Greatly reduces risk to confidentiality, integrity, and availability of System and data.</li> <li>● Resolves long-standing audit issues.</li> <li>● Provides opportunity for easier integration with identity verification (first- and second-party fraud mitigation).</li> </ul>
Centrally managed identities for the System.	<ul style="list-style-type: none"> <li>● Decreases workload across DEO for managing access.</li> <li>● Reduces risk by improving consistency, automation, audit, and control of users and access.</li> </ul>
Modernized authentication for the public and other external entities accessing the System.	<ul style="list-style-type: none"> <li>● Mitigates third-party fraud and helps address insider threats.</li> <li>● Resolves long-standing audit issues.</li> </ul>
Capability for alerting on and auditing current and historical identity activity/access within the System.	<ul style="list-style-type: none"> <li>● Reduces information security and fraud risk.</li> <li>● Improved troubleshooting of access issues.</li> <li>● More timely/accurate responses to audits.</li> <li>● Lowers risk of audit findings.</li> </ul>

### C. Critical Success Factors

- A documented, enterprise compatible IAM process is identified or created.
- System and enterprise IAM processes are aligned.
- Logging/audit information is accessible in central platform (to be determined).
- Redundant System roles have been removed.
- System owner(s) and other relevant process roles are updated, and an ongoing process is in place to track and update them.
- Stale accounts are appropriately expired.
- All accounts meet DEO password/access control requirements.

### D. Key Dates

Key Date	Importance and Relevance to the Project
February 8, 2023	Issue purchase order
February 8 to February 27, 2023	Vendor onboarding
May 11, 2023	Vendor completes audit, analysis, and documentation on DEO system
June 2, 2023	Vendor delivers Continuous Modernization Plan and Roadmap
June 9, 2023	Vendor delivers Transition Plan and Project Closeout Report
June 16, 2023	Closeout Phase complete; project complete

### E. Major Deliverables

Deliverable ID	Major Deliverable	Deliverable Description
1	Project Kickoff Meeting	The vendor conducts the IAM project kickoff meeting and provides agenda and materials.
2	Project Management Plan	The vendor provides the final version of the PMP after review and approval by DEO
3	Working Sessions, Audit, and Report	The vendor conducts a series of work sessions to discuss, evaluate, and develop IAM processes and requirements. The work sessions are part of the vendor's overall audit of the same, with the report being the output of the audit and working sessions.
4	System Resource Map	The vendor provides an inventory of existing DEO roles, teams, and resources, and documents how existing resources are currently producing deliverables.
5	IAM policies and processes	The vendor analyzes, updates, and creates DEO security policies and processes.

<b>Deliverable ID</b>	<b>Major Deliverable</b>	<b>Deliverable Description</b>
6	IAM Process Roles and Responsibilities	The vendor provides “as is” and “to be” process roles and responsibilities documentation.
7	Identity Governance Model	The vendor reviews existing documentation on applications, roles, access, and responsibilities; updates that documentation; and delivers a final version of that documentation after review and approval by DEO.
8	IAM Continuous Modernization Plan and Roadmap	As part of the transition into continuous improvement, which begins after go-live, the vendor delivers the Continuous Modernization Plan and corresponding roadmap after review and approval by DEO.
9	Transition Plan	As part of the transition into continuous improvement, which begins after go-live, the vendor delivers the Transition Plan after review and approval by DEO.
10	Project Closeout Report	The vendor provides the Project Closeout Report after review and approval by DEO.

## F. Major Milestones

<b>Milestone ID</b>	<b>Major Milestone</b>	<b>Milestone Description</b>
1	Project Kickoff Meeting	The vendor conducts the IAM project kickoff meeting and provides agenda and materials.
2	Project Management Plan	The vendor provides the final version of the PMP after review and approval by DEO
3	Working Sessions, Audit, and Report	The vendor conducts a series of work sessions to discuss, evaluate, and develop IAM processes and requirements. The work sessions are part of the vendor’s overall audit of the same, with the report being the output of the audit and working sessions.
4	System Resource Map	The vendor provides an inventory of existing DEO roles, teams, and resources, and documents how existing resources are currently producing deliverables.
5	IAM policies and processes	The vendor analyzes, updates, and creates DEO security policies and processes.
6	IAM Process Roles and Responsibilities	The vendor provides “as is” and “to be” process roles and responsibilities documentation.

Milestone ID	Major Milestone	Milestone Description
7	Identity Governance Model	The vendor reviews existing documentation on applications, roles, access, and responsibilities; updates that documentation; and delivers a final version of that documentation after review and approval by DEO.
8	IAM Continuous Modernization Plan and Roadmap	As part of the transition into continuous improvement, which begins after go-live, the vendor delivers the Continuous Modernization Plan and corresponding roadmap after review and approval by DEO.
9	Transition Plan	As part of the transition into continuous improvement, which begins after go-live, the vendor delivers the Transition Plan after review and approval by DEO.
10	Project Closeout Report	The vendor provides the Project Closeout Report after review and approval by DEO.

### G. Key Stakeholders

Key Stakeholder	Project Interest
Meredith Ivey	Acting Secretary, Department of Economic Opportunity
Lindsay Volpe	Deputy Secretary, Workforce Services
Domenic DiLullo	Chief Technology Officer
Paul Forrester	Chief Information Officer
Allyce Moriak	Chief Financial Officer
Wendy Castle	RA Modernization Program Owner – Business
Nicole Sanislow	RA Modernization Program Manager – Business
Tom Richardson	RA Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	RA Modernization Program Manager – Information Technology
Mark Miller	Project Owner
Nicole Cain	Project Manager

### H. Significant Project Assumptions and Constraints

#### Project Assumptions

1. The identified requirements are correct and complete.
2. The assigned IT resources possess relevant knowledge and skills to complete the identified tasks.
3. Members of the project team will have access to the necessary tools, hardware, and materials necessary to complete the identified tasks.

4. All relevant stakeholders will attend required status meetings. However, there may be instances where some stakeholders are unavailable to attend.
5. The project sponsor will be responsive and prepared to make decisions regarding the project cost and scope.
6. Funding will be available for necessary procurements, if any.
7. Even though the individual access flows have not been identified/assigned resources, the project is achievable within the allotted time with the available resources.
8. The claimant IAM process already developed and implemented will be compatible with any additional solutions implemented as part of this project.

## II. Work Breakdown Structure

WBS	Task Name
<b>1</b>	<b>IAM</b>
<b>1.1</b>	<b>Initiation</b>
<b>1.2</b>	<b>Planning</b>
<b>1.3</b>	<b>Execution</b>
1.3.1	Begin Execution Phase
<b>1.3.1</b>	<b>Analyze &amp; update existing roles</b>
<b>1.3.3</b>	<b>Procurement</b>
<b>1.3.3.1</b>	<b>Requirements</b>
<b>1.3.3.2</b>	<b>Procurement Template</b>
<b>1.3.3.3</b>	<b>Advertisement and Award</b>
1.3.2.5	Issue of Purchase Order
<b>1.3.5</b>	<b>Vendor Onboarding</b>
1.3.5.1	Receive notification from contracts to start the process
1.3.5.2	Determine logistics for vendor/person (location, laptop, phone, etc)
1.3.5.3	Determine Access to Shares, SharePoint, etc.
<b>1.3.5.4</b>	<b>Fingerprinting/Background</b>
1.3.5.4.1	Provide fingerprint instructions to vendor/person
1.3.5.4.2	Receive notification of completion/submission of fingerprints
1.3.5.4.3	Perform Background Check
1.3.5.4.4	Receive notification from Contracts (yes/no) for person based on fingerprint/background check
<b>1.3.5.5</b>	<b>EAR Form</b>
1.3.5.5.1	Complete EAR Form
1.3.5.5.2	Receive notification EAR form is completed
<b>1.3.5.6</b>	<b>HelpDesk</b>
1.3.5.6.1	Receive Notification Network Account is created for person(s)
<b>1.3.5.6.2</b>	<b>Share, SharePoint, etc Access</b>
1.3.5.6.2.1	Submit Helpdesk Ticket for Access of new person
1.3.5.6.2.2	Receive Notification Access has been granted
<b>1.3.5.7</b>	<b>Vendor/Person Start</b>

1.3.5.7.1	Receive Notification PO is issued
1.3.5.7.2	Identify Start Date
<b>1.3.5.8</b>	<b>First Day</b>
1.3.5.8.1	Confirm Network Access
<b>1.3.6</b>	<b>DELIVERABLE 1: Project Kickoff Meeting (Contract = 3/29/2023)</b>
<b>1.3.7</b>	<b>DELIVERABLE 2: Project Management Plan (Contract = 4/7/2023)</b>
<b>1.3.8</b>	<b>DELIVERABLE 3: Project Schedule (Contract = 4/7/2023)</b>
<b>1.3.9</b>	<b>DELIVERABLE 4: Working Sessions, Audit, and Report (Contract = 5/10/2023)</b>
<b>1.3.10</b>	<b>DELIVERABLE 5: System Resource Map (Contract = 5/10/2023)</b>
<b>1.3.11</b>	<b>DELIVERABLE 6: IAM Policies (Contract = 5/24/2023)</b>
<b>1.3.12</b>	<b>DELIVERABLE 7: IAM Process Roles and Responsibilities Documentation (Contract = 5/24/2023)</b>
<b>1.3.13</b>	<b>DELIVERABLE 8: DEO Identity Governance Model and Directory (Contract = 6/9/2023)</b>
<b>1.3.14</b>	<b>DELIVERABLE 9: IAM Continuous Modernization Plan and Roadmap (Contract = 6/22/2023)</b>
<b>1.3.15</b>	<b>DELIVERABLE 10: Transition Plan (Contract = 6/28/2023)</b>
<b>1.3.16</b>	<b>DELIVERABLE 11: Project Closeout Report (Contract = 6/29/2023)</b>
1.3.17	Execution Phase Complete
<b>1.4</b>	<b>Monitoring and Controlling</b>
<b>1.4.8</b>	<b>Deliver Weekly Status Update - includes Schedule, Cost, Scope, &amp; RAID</b>
<b>1.4.9</b>	<b>Conduct Weekly Team Meeting</b>
<b>1.4.3</b>	<b>Deliver Monthly Status Update at RA Mod Monthly Meeting</b>
<b>1.2.1</b>	<b>Deliverable: Resource Plan</b>
<b>1.2.9</b>	<b>Deliverable: Project Spending Plan</b>
1.5	Monitoring and Controlling Phase Complete
<b>1.6</b>	<b>Project Closeout</b>
1.6.1	Schedule Project Closeout Meeting
1.6.5	Conduct Project Closeout meeting
<b>1.6.6</b>	<b>Conduct Lessons Learned Meeting</b>
1.7	Closeout Phase complete

### III. Resource Loaded Project Schedule

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessor	Success	Resource Names	Status
1	IAM	78%	400.5 days?	Mon 12/6/21	Thu 6/29/23				Late
1.1	Initiation	100%	54 days	Mon 12/6/21	Fri 2/18/22				Complete
1.2	Planning	100%	150 days	Mon 12/6/21	Fri 7/1/22				Complete
1.3	Execution	63%	260 days?	Fri 6/17/22	Thu 6/29/23				On Schedule
1.3.1	Begin Execution Phase	100%	0 days	Thu 6/30/22	Thu 6/30/22	52	409,414,3		Complete
1.3.1	Analyze & update existing roles	100%	16 days	Wed 8/10/22	Wed 8/31/22				Complete
1.3.3	Procurement	100%	194 days	Fri 6/17/22	Mon 3/27/23				Complete
1.3.3.1	Requirements	100%	85 days	Fri 6/17/22	Mon 10/17/22				Complete
1.3.3.2	Procurement Template	100%	15 days	Mon 10/3/22	Fri 10/21/22				Complete
1.3.3.3	Advertisement and Award	100%	120 days	Fri 9/30/22	Mon 3/27/23				Complete
1.3.2.5	Issue of Purchase Order	100%	0 days	Mon 3/27/23	Mon 3/27/23	130	133,155,1	Contract Manager	Complete
1.3.5	Vendor Onboarding	100%	27 days	Wed 2/22/23	Thu 3/30/23				Complete
1.3.6	DELIVERABLE 1: Project Kickoff Meeting (Contract = 3/29/2023)	100%	1.25 days	Mon 3/27/23	Wed 3/29/23			Vendor	Complete
1.3.7	DELIVERABLE 2: Project Management Plan (Contract = 4/7/2023)	100%	9 days	Tue 3/28/23	Sat 4/8/23			Vendor	Complete
1.3.8	DELIVERABLE 3: Project Schedule (Contract = 4/7/2023)	100%	18 days	Tue 3/28/23	Thu 4/20/23			Vendor	Complete
1.3.9	DELIVERABLE 4: Working Sessions, Audit, and Report (Contract = 5/10/2023)	82%	35 days?	Tue 3/28/23	Mon 5/15/23			Vendor	Future Task
1.3.10	DELIVERABLE 5: System Resource Map (Contract = 5/10/2023)	0%	33 days	Tue 3/28/23	Thu 5/11/23			Vendor	Future Task
1.3.11	DELIVERABLE 6: IAM Policies (Contract = 5/24/2023)	0%	26 days	Fri 4/21/23	Fri 5/26/23			Vendor	Future Task
1.3.12	DELIVERABLE 7: IAM Process Roles and Responsibilities Documentation (Contract = 5/24/2023)	0%	24 days	Fri 4/21/23	Wed 5/24/23			Vendor	Future Task
1.3.13	DELIVERABLE 8: DEO Identity Governance Model and Directory (Contract = 6/9/2023)	0%	53 days	Tue 4/4/23	Fri 6/16/23			Vendor	Future Task
1.3.14	DELIVERABLE 9: IAM Continuous Modernization Plan and Roadmap (Contract = 6/22/2023)	0%	22 days	Wed 5/24/23	Fri 6/23/23			Vendor	Future Task
1.3.15	DELIVERABLE 10: Transition Plan (Contract = 6/28/2023)	0%	13 days	Mon 6/12/23	Wed 6/28/23			Vendor	Future Task
1.3.16	DELIVERABLE 11: Project Closeout Report (Contract = 6/29/2023)	0%	13 days	Mon 6/12/23	Thu 6/29/23			Vendor	Future Task
1.3.17	Execution Phase Complete	0%	0 days	Thu 6/29/23	Thu 6/29/23	298,290,282	418		Future Task
1.4	Monitoring and Controlling	78%	235 days	Fri 7/1/22	Tue 6/6/23				Late
1.4.8	Deliver Weekly Status Update - Includes Schedule, Cost, Scope, & RAID	81%	233 days	Fri 7/1/22	Fri 6/2/23		418		On Schedule
1.4.9	Conduct Weekly Team Meeting	78%	235 days	Fri 7/1/22	Tue 6/6/23	54	418		Late
1.4.3	Deliver Monthly Status Update at RA Mod Monthly Meeting	73%	233 days	Fri 7/1/22	Fri 6/2/23				Late
1.2.1	Deliverable: Resource Plan	100%	4 days	Fri 7/1/22	Wed 7/6/22				Complete
1.2.9	Deliverable: Project Spending Plan	100%	4 days	Fri 7/1/22	Wed 7/6/22				Complete

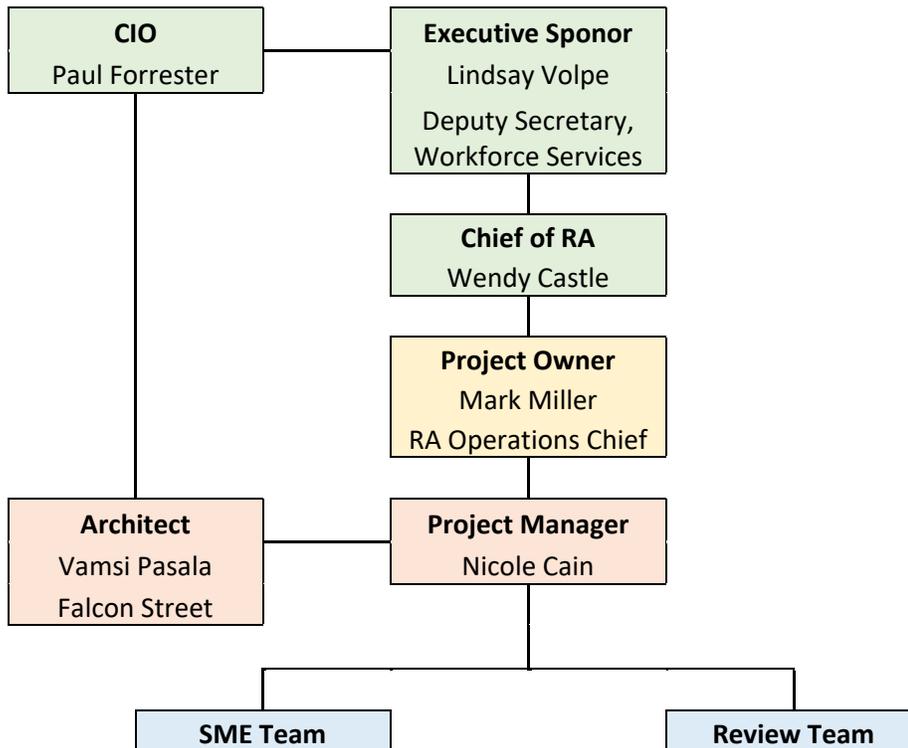
1.5	Monitoring and Controlling Phase Complete	0%	0 days	Thu 6/29/23	Thu 6/29/23	299,301,347	420			Future Task
1.6	<b>Project Closeout</b>	<b>0%</b>	<b>0.5 days</b>	<b>Thu 6/29/23</b>	<b>Thu 6/29/23</b>					<b>Future Task</b>
1.6.1	Schedule Project Closeout Meeting	0%	0 days	Thu 6/29/23	Thu 6/29/23	418	421	PM		Future Task
1.6.5	Conduct Project Closeout meeting	0%	0.25 days	Thu 6/29/23	Thu 6/29/23	420	423	PM,DEO Review Team		Future Task
1.6.6	<b>Conduct Lessons Learned Meeting</b>	<b>0%</b>	<b>0.25 days</b>	<b>Thu 6/29/23</b>	<b>Thu 6/29/23</b>					<b>Future Task</b>
1.7	Closeout Phase complete	0%	0 days	Thu 6/29/23	Thu 6/29/23	424				Future Task

#### IV. Project Spending Plan

FY 2021-22 Expenditures	FY 2022-23 Expenditures
Software OpEx: \$156,880	Software OpEx: \$0.00
Labor OpEx: \$12,500	Labor OpEx: \$161,866.

#### V. Project Organization and Methodology

##### A. Project Organizational Chart



##### B. Project Roles and Responsibilities

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> <li>Provide guidance on overall strategic direction</li> <li>Advising the Strategic Planning Office and project manager of risks that may impact the project</li> <li>Facilitate resolution of significant issues in the project</li> <li>Reviewing and signing off on key milestones</li> </ul>

Name	Project Role	Responsibility
Domenic DiLullo	CTO	<ul style="list-style-type: none"> <li>• Provide guidance on overall strategic direction</li> <li>• Advising the Strategic Planning Office and project manager of risks that may impact the project</li> <li>• Facilitate resolution of significant issues in the project</li> <li>• Reviewing and signing off on key milestones</li> </ul>
Wendy Castle	Chief of RA	<ul style="list-style-type: none"> <li>• Provide guidance on overall strategic direction</li> <li>• Advising the Strategic Planning Office and project manager of risks that may impact the project</li> <li>• Facilitate resolution of significant issues in the project</li> <li>• Reviewing and signing off on key milestones</li> </ul>
Mark Miller Ryan Tolia	Co-Project Owner	<ul style="list-style-type: none"> <li>• Contributes subject matter expertise</li> <li>• Assists the Project Managers in responding to risks and issues</li> <li>• Assists the Project Manager in evaluating change requests</li> <li>• Reviews deliverables and project documents, identifying any deficiencies</li> <li>• Reviews and approves deliverables</li> <li>• Reviews and approves RFCs</li> </ul>
Nicole Cain	Project Manager	<ul style="list-style-type: none"> <li>• Manages all aspects of the project and ensure compliance with project plan</li> <li>• Monitors project progress and schedule adherence</li> <li>• Completes all documents related to the project</li> <li>• Identifies and manages risks according to the project plan</li> </ul>
Vamsi Pasala/Falcon Street	Architect and Technical Lead	<ul style="list-style-type: none"> <li>• Responsible for assisting the team in finding solutions to issues elevated to him</li> <li>• Is available to project sponsors for technical questions regarding direction of the project and any dependencies/impacts of other projects</li> <li>• Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team.</li> </ul>

Name	Project Role	Responsibility
SME Team	Subject Matter Expert(s)	<ul style="list-style-type: none"> <li>• Process development tasks</li> <li>• Contributes subject matter expertise</li> <li>• Complete assigned project tasks in accordance with the Project Schedule</li> <li>• Identifies risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP</li> <li>• Assists the Project Managers in responding to risks and issues</li> <li>• Assists the Project Manager in evaluating change requests</li> </ul>
Review Team	Documentation Reviewers	<ul style="list-style-type: none"> <li>• Reviews documentation when submitted by Vendor</li> <li>• Contributes subject matter expertise</li> <li>• Completes assigned project tasks in accordance with the Project Schedule</li> <li>• Identifies risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP</li> <li>• Assists the Project Managers in responding to risks and issues</li> <li>• Assists the Project Manager in evaluating change requests</li> </ul>
Vendor	Strategic Planning Office (SPO)	<ul style="list-style-type: none"> <li>• Monitors project progress</li> <li>• Facilitates DEO Leadership Team Governance meetings</li> <li>• Provides guidance and support to project manager and project team members</li> </ul>
Vendor	IAM Experts	<ul style="list-style-type: none"> <li>• Provides expertise in auditing, analyzing, documenting, and recommending IAM technologies</li> </ul>

### C. Project Management Methodology

DEO will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure DEO’s satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. DEO believes strong project management is critical throughout the life of any successful project.

For this project, DEO's project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from DEO within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the DEO Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- DEO's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

DEO believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

## ***VI. Business Process Organizational Change Management Plan***

This project intends to improve the delivery, execution, security, or convenience of DEO's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Stakeholder identification and engagement plans
- Process identification and improvement plans
- Educational assessment and training plans
- Change risk assessment
- Change Advocate networks
- Change Management
- Business Relationship Management
- IT Service Management

**VII. Project Risk Management Plan**

<b>Risk Description/Impact</b>	<b>Probability of Occurrence (high, medium, low)</b>	<b>Risk Tolerance (high, medium, low)</b>	<b>Mitigation Strategy</b>	<b>Assigned Owner</b>
Hurricane impacting the state delays the schedule	Medium	High	Adjust schedule accordingly	PM
Divisional and/or Bureau resistance of new process	Medium	Medium	Involve management and impacted staff throughout engagement to increase adoption rate and ensure a successful transition	PM
Insufficient knowledge transfer of new process	Medium	Medium	Involve impacted staff throughout engagement to increase participation and knowledge of new processes	PM
Identified technical solutions do not address requirements	Low	Medium	Procure necessary solution(s)	SME/ Implementation Teams, Owner
Procurement(s) are outside of available budget.	Low	Medium	Identify alternative solutions, seek additional funding	SME Team, Owner
Resource requirements for execution of roadmap are beyond original expectations.	Medium	Medium	Prioritize highest-risk access flows, adjust schedule, plan additional phases.	PM/SME
Procurement Delays for IAM Services	High	Medium	Communication with Senior Leadership and Procurement Team(s).	PM/Project Owner/Senior Leadership

**VIII. Capacity Plan**

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

**Project Capacity Planning**

- **Establish Cross-Functional Team:** To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- **Calculate Resource Capacity:** Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- **Determine Resource Requirements:** For each project, look at the scope and what resources are required to do the task for the project.
- **Prioritize Projects:** Which projects are most important, and which can be put aside for the time being? You can't do everything at once.
- **Allocate Resources Based on Project Priority:** Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- **Keep the Lines of Communications Open:** Communicate between executives, project management leaders and stakeholders.
- **Document Known Risks:** Monitor risks such as union strikes, weather, government regulations that stop a project or create new ones unexpectedly.
- **Plan for How to Handle Too Much Capacity:** Understand where it is and how to resolve it (such as reassigning), or not enough capacity (again, where/how).

**REEMPLOYMENT ASSISTANCE SYSTEM MODERNIZATION  
2020A SPECIAL CATEGORIES (100270) and Back of Bill (105174)  
Projected Spend Plan Summary  
as of 4/30/2023**

SFY 2022-2023

Appropriation		SFY 21-22	July	August	September	October	November	December	January	February	March	April	May	June	SFY 22-23	TOTAL	Revert
IV&V	Projected		-	-	-	-	-	-	-	-	-	-	77,458.64	67,792.67	145,251.31	\$ 1,170,000	-
\$ 1,170,000	Actual	\$ 1,024,748.69	-	-	-	-	-	-	-	-	-	-	-	-	-		
			\$ -														
Maint & Ops	Projected		895,524.82	436,473.56	698,816.62	469,928.12	469,928.12	1,755,298.37	3,570,096.08	2,544,255.68	1,240,190.52	1,997,569.42	1,452,955.37	2,164,971.58	11,185,277.66	\$ 19,320,000	-
\$ 19,320,000	Actual	\$ 8,134,722.34	621,176.79	17,100.00	2,473,903.76	(1,837,715.30)	-	650,859.00	-	3,625,925.36	1,903,478.50	112,622.60	-	-	7,567,350.71		
Modernization (GR)	Projected		548,327.37	1,124,142.50	629,168.23	367,171.95	393,051.95	1,643,983.06	1,149,639.05	1,457,403.22	1,203,472.07	720,034.63	1,178,818.11	1,418,356.76	7,804,352.86	\$ 15,510,000	-
\$ 15,510,000	Actual	\$ 7,705,647.14	561,706.29	748,978.60	488,565.70	14,280.00	20,631.82	556,604.61	(33,731.93)	1,379,787.49	1,360,897.18	109,458.24	-	-	5,207,178.00		
Modernization (ARPA)	Projected		189,240.00	465,729.25	1,206,802.56	409,460.00	384,460.00	581,847.75	462,850.90	2,697,315.18	6,818,550.53	5,359,250.87	7,950,134.44	11,337,534.33	31,229,943.64	\$ 31,229,944	25,170,056.36
\$ 56,400,000	Actual not charged against 105174	\$ -	61,240.00	160,269.25	748,000.00	281,342.56	-	1,009,582.15	-	2,374,854.05	7,177,977.21	129,009.64	-	-	11,942,274.86		
<b>Total Modernization</b>	<b>Projected Total</b>	<b>\$ -</b>	<b>\$ 1,633,092</b>	<b>\$ 2,026,345</b>	<b>\$ 2,534,787</b>	<b>\$ 1,246,560</b>	<b>\$ 1,247,440</b>	<b>\$ 3,981,129</b>	<b>\$ 5,182,586</b>	<b>\$ 6,698,974</b>	<b>\$ 9,262,213</b>	<b>\$ 8,076,855</b>	<b>\$ 10,659,367</b>	<b>\$ 14,988,655</b>	<b>\$ 50,364,825</b>	<b>\$ 67,229,944</b>	<b>\$ 25,170,056.36</b>
<b>\$ 92,400,000</b>	<b>Actual Total</b>	<b>\$ 16,865,118.17</b>	<b>\$ 1,244,123</b>	<b>\$ 926,348</b>	<b>\$ 3,710,469</b>	<b>\$ (1,542,093)</b>	<b>\$ 20,632</b>	<b>\$ 2,217,046</b>	<b>\$ (33,732)</b>	<b>\$ 7,380,567</b>	<b>\$ 10,442,353</b>	<b>\$ 351,090</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 24,716,803.57</b>		

Q1	
Actual	\$5,880,940

Q2	
Actual	\$695,585

Q3	
Actual	\$17,789,188

Q4	
Projected	\$25,999,112

**EXPENDITURE RECAP**

	Appropriation	SFY 21-22	July	August	September	October	November	December	January	February	March	April	May	June	SFY 22-23	TOTAL
<b>100270</b>	<b>Appropriation</b>		\$ 19,120,602												\$ 19,120,602	
	<b>Release</b>	\$ 16,865,118	\$ 2,192,179		\$ 2,192,157			\$ 2,192,190		\$ 8,904,419	\$ 2,192,190		\$ 1,447,467		\$ 19,120,602	\$ 35,985,720
	<b>Expenditures</b>	\$ 16,865,118														
	UCMNT (Actual)		\$ 621,177	\$ 17,100	\$ 2,473,904	\$ (1,837,715)		\$ 650,859		\$ 3,602,474	\$ 1,903,479	\$ 112,623			\$ 7,543,900	
	UCMOD (Actual)		\$ 622,946	\$ 909,248	\$ 1,236,566	\$ 295,623	\$ 20,632	\$ 1,566,187	\$ (33,732)	\$ 1,927,480	\$ 2,044,249	\$ 109,458			\$ 8,698,656	
	UCIVV (Actual)															
	UCMNT (Proj)											\$ -	\$ 1,452,955	\$ 2,164,972	\$ 3,617,927	
	UCMOD (Proj)												\$ 1,178,818	\$ 1,418,357	\$ 2,597,175	
	UCIVV (Proj)											\$ -			\$ -	
	UCMNT Transfer In															
	UCMOD Transfer Out												(3,337,056.00)		\$ (3,337,056)	
	UCMOD Transfer In											\$ -			\$ -	
	UCMNT Transfer														\$ -	
	FRR21 (Transfer)														\$ -	
	<b>Appropriation Balance</b>		\$ 17,876,479	\$ 16,950,131	\$ 13,239,662	\$ 14,781,754	\$ 14,761,122	\$ 12,544,077	\$ 12,577,809	\$ 7,047,855	\$ 3,100,127	\$ 2,878,046	\$ 3,583,329	\$ 0		
	<b>Release Balance</b>		\$ 948,056	\$ 21,708	\$ (1,496,604)	\$ 45,488	\$ 24,856	\$ 1	\$ 33,733	\$ 3,408,198	\$ 1,652,660	\$ 1,430,579	\$ 3,583,329	\$ 0		
			\$ 0	\$ -	\$ (0)	\$ -										
<b>105174</b>	<b>Appropriation</b>		\$ 56,400,000													
	<b>Release</b>		\$ -							\$ 22,320,608			\$ 9,951,908		\$ 32,272,516	\$ 32,272,516
	UCMOD Actual									\$ 535,636	\$ 424,649.80		\$ -	\$ -	\$ 960,285	
	FRR21 (Trans)												\$ 4,510,600	\$ -	\$ 4,510,600	
	FRR21 (Proj)	\$ -										\$ -	\$ 7,950,134	\$ 11,337,534	\$ 19,287,669	
	FRR21 (Actual)									\$ 1,314,976	\$ 6,069,975	129,009.64			\$ 7,513,961	
	<b>Appropriation Balance</b>		\$ 56,400,000	\$ 56,400,000	\$ 56,400,000	\$ 56,400,000	\$ 56,400,000	\$ 56,400,000	\$ 56,400,000	\$ 54,549,388	\$ 48,054,763	\$ 48,054,763	\$ 35,594,028	\$ 24,256,494		
	<b>Release Balance</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,469,996	\$ 13,975,371	\$ 13,846,361	\$ 11,337,535	\$ 0	\$ 0	

Expenditures in incorrect categories

Category	Grant	
	UCIVV	UCMOD
100778	77,458.64	257,523.90
105174		140,529.64
Grand Total	77,458.64	398,053.54

UCIVV SPEND PLAN							July	August	September	October	November	December	January	February	March	April	May	June						
PO	Start Date	End Date	Vendor	Contract #	Description	Contract Amount	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 22/23 Oblig	2-Year Cost
PO2488307	7/30/21	6/30/22	Gartner Group	C3108	IV&V Services for RA Modernization																		-	-
					Deliverable 1a&b- IV&V Management Plan	300,300.00	300,300.00																-	300,300.00
					Deliverable 22&b- IV&V Schedule	300,300.00	300,300.00																-	300,300.00
					Deliverable 3 - Ongoing IV&V Monitoring	562,200.00	424,148.69										77,458.64		-		67,792.67		145,251.31	569,400.00
					<b>Monthly Grand Totals</b>	<b>1,162,800.00</b>	<b>1,024,748.69</b>								-		<b>77,458.64</b>		-		<b>67,792.67</b>		<b>145,251.31</b>	<b>1,170,000.00</b>



<b>Staff Aug Monthly Totals</b>	963,099.77	-	58,004.00	17,100.00	103,873.05	-	-	-	-	406,285.14	239,438.68	234,771.08	210,160.41	93,000.10	171,952.20	-	251,704.66	-	1,451,992.25	2,415,092.02
<b>Monthly Grand Totals</b>	8,134,722.34	895,524.82	621,176.79	17,100.00	2,467,792.76	(1,831,604.30)	-	650,859.00	-	3,625,925.36	1,240,190.52	1,903,478.50	1,997,569.42	112,622.60	1,452,955.37	-	2,164,971.58	-	13,024,940.86	21,159,663.20

UCMNT SPEND PLAN								July	August	September	October	November	December	January	February	March	April	May	June	SFY 22/23 Oblig	2-Year Cost			
PO	Rec	Start Date	End Date	Vendor	Contract	Description	Contract Amount	SFY 21/22 Oblig	Projected	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 22/23 Oblig	2-Year Cost
TBD	Y	6/1/2023	5/31/2024	SHI	TBD	SHI - Microsoft Dynamics Fraud Protection yr 3	TBD		-	-	-	-	-	-	-	-	-	-	-	-	-	-	650,859.00	650,859.00
<b>Monthly Grand Totals</b>									-	-	-	-	-	-	-	-	-	-	-	-	-	-	650,859.00	650,859.00

PROJECT: Data Warehouse Management  
 FUNDING: Modernization GR(UCMOD)  
 STATUS: Complete

							July	August	September	October	November	December	January	February	March	April	May	June			SFY 21/22 Oblig	SFY 22/23 Oblig	2-Year Cost	
PO	Rec	Start Date	End Date	Vendor	Contract #	Description	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Actual	Projected	Actual			
BA2F67	Y	12/23/2021	12/22/2022	Insight Public Sector	C3281	Striim Subscription Licensing for Data Warehouse 2-Years									-		-			-		-	93,096.96	93,096.96
C10A4B	Y	12/23/2022	12/22/2023	Insight Public Sector		Striim Subscription Licensing for Data Warehouse 2-Years									93,062.84	49,633.52							49,633.52	49,633.52
B89955	Y	5/4/2021	5/5/2022	Insight Public Sector	N/A	Tableau Server Core and Tableau Creator Licenses for RA									-		-			-		-	6,386.33	6,386.33
BAF7FD	Y	5/6/2022	5/6/2023	Insight Public Sector	N/A	Tableau Server Core and Tableau Creator Licenses for RA		#####															179,023.17	179,023.17
B85E62	Y	12/15/2021	12/14/2023	Carahsoft	N/A	Snowflake Subscription Licensing & Training for Data Warehouse																	-	-
															-		-			-			-	-
<b>Totals</b>							<b>99,483.29</b>	<b>#####</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>93,062.84</b>	<b>49,633.52</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>272,086.01</b>	<b>328,139.98</b>

PROJECT: .NET and ORM Upgrade  
 FUNDING: Modernization GR(UCMOD)  
 STATUS: Complete

.NET and ORM Upgrade							July	August	September	October	November	December	January	February	March	April	May	June						
PO	Rec	Start Date	End Date	Vendor	Contract #	Description	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 22/23 Oblig	2-Year Cost
B9D823	N	9/14/2021	9/13/2022	SHI	NA	Visual Studio Licenses 2019 Pro	15,307.50								-		-		-		-		-	15,307.50
							-								-		-		-		-		-	-
<b>Totals</b>							<b>15,307.50</b>								-		-		-		-		-	<b>15,307.50</b>

**PROJECT:** Strategic Planning Office  
**FUNDING:** Modernization GR(UCMOD)  
**STATUS:** In Progress

Strategic Planning Office (SPO)							July	August	September	October	November	December	January	February	March	April	May	June	SFY 21/22 Oblig	SFY 22/23 Oblig	2-Year Cost				
PO	Recurring	Start Date	End Date	Vendor	Contract #	Description	Contract Amount	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 21/22 Oblig	SFY 22/23 Oblig	2-Year Cost
BA037C	Y	10/20/2021	6/30/2022	Beacon Systems	C3186	Strategic Project Office	1,306,920.00			1,332.50													414,835.00	1,332.50	416,167.50
C0C441	Y	10/22/2022	6/30/2022	Beacon Systems	C3186	Strategic Project Office	2,374,365.00										69,676.76		547,101.02		542,217.61		#####	1,158,995.38	
B9E799	N	10/5/2021	10/4/2022	Carahsoft	C3232	Configuration Services for ServiceNow for the SPO	560,392.00	53,079.48		7,946.64				62,656.20	-		-		-		-		323,654.92	123,682.32	447,337.24
C0A158	N	9/15/2022	12/9/2022	Carahsoft	C3232	Configuration Services for ServiceNow for the SPO	139,544.52								69,772.26	139,544.52							-	139,544.52	139,544.52
BA267D	N	11/17/2021	11/16/2022	SHI		Microsoft Project and Visio Licenses for SPO	10,515.70								-		-		-		-		10,515.70	-	10,515.70
BB3166	Y	6/1/2022	9/29/2022	Carahsoft		ITSM Pro ServiceNow add-on	33,491.82								-		-		-		-		33,491.82	-	33,491.82
<b>Totals</b>								53,079.48		9,279.14				62,656.20	69,772.26	139,544.52	69,676.76	-	547,101.02	-	542,217.61	-	782,497.44	#####	2,206,052.16

PROJECT: Reporting  
 FUNDING: Modernization GR(UCMOD)  
 STATUS: Complete

Reporting						July	August	September	October	November	December	January	February	March	April	May	June	SFY 21/22 Oblig	SFY 22/23 Oblig	2-Year Cost				
PO	Rec	Start Date	End Date	Vendor	Contract #	Description	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 21/22 Oblig	SFY 22/23 Oblig	2-Year Cost
BB27EE		5/23/2022	6/30/2022	SHI		FY21-22 SHI-Microsoft Visio Professional 2021 License	-	4,617.63							-		-		-		-		4,617.63	4,617.63
																							-	
						<b>Totals</b>	-	4,617.63						-		-		-		-			4,617.63	4,617.63

**PROJECT:** Staff Augmentation  
**FUNDING:** Modernization GR(UCMOD)  
**STATUS:** In Progress

Shared Resource - Staff Augmentation

PO	Rec	Start Date	End Date	Vendor	Contract #	Contract Amount	SFY 21/22 Oblig	July	August	September	October	November	December	January	February	March		April		May		June		SFY 22/23 Oblig	2-Year Cost
								Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected		
B90805	Y	12/1/2021	6/30/2022	Tal Search Group	C3032	205,920.00	78,903.00	18,117.00																18,117.00	97,020.00
BA2B4F	Y	12/1/2021	6/30/2022	Kyra Solutions	C3141	206,960.00	86,017.75	22,885.00																22,885.00	108,902.75
C00A11		7/1/2022	6/30/2023	Kyra Solutions	C3141	105,221.25							19,402.50		55,819.50	7,649.25		7,450.00		7,450.00		7,450.00		97,572.00	97,572.00
B99D49	Y	8/2/2021	6/30/2022	Randstad	C3147	197,600.00	117,990.00																	-	117,990.00
B99D4E	Y	3/1/2022	6/30/2022	Vitaver	C3148	208,000.00	44,600.00																	-	44,600.00
B9A07B	Y	8/1/2021	6/30/2022	Vitaver	C3164	208,000.00	157,600.00	16,800.00			14,280.00													16,800.00	174,400.00
B9AA22	Y	8/13/2021	6/30/2022	IT Trailblazers	C3166	135,200.00	88,335.00	11,440.00											(14,280.00)					11,440.00	99,775.00
BA237C	Y	10/1/2021	6/30/2022	Tal Search Group	C3194	218,400.00	110,827.50	18,243.75																18,243.75	129,071.25
C0274B	Y	7/1/2022	6/30/2023	Tal Search Group	C3194	91,192.50				19,320.00					36,120.00	8,938.13		8,938.13		8,938.13		8,938.11		82,254.37	82,254.37
B9DD15	Y	9/22/2021	6/30/2022	Tal Search Group	C3195	191,360.00	100,096.00	19,320.00																19,320.00	119,416.00
B9C690	Y	9/1/2021	6/30/2022	V2Soft	C3196	144,664.00	74,401.11	12,240.80																12,240.80	86,641.91
B9D5B1	Y	9/16/2021	6/30/2022	3K Technologies	C3197	145,600.00	94,640.00		12,320.00															12,320.00	106,960.00
B9DD0D	Y	10/1/2021	6/30/2022	Tal Search Group	C3201	152,880.00	135,583.00	17,297.00																17,297.00	152,880.00
B9CCCC	Y	9/7/2021	6/30/2022	Creative Consulting	C3202	176,800.00	15,980.00											14,733.33		14,733.33		14,733.33		44,199.99	60,179.99
B9DE23	Y	9/23/2021	6/30/2022	Ardent	C3223	187,200.00	112,680.00	7,920.00																7,920.00	120,600.00
BA6B17	Y	1/19/2022	6/30/2022	Vitaver	C3271	88,400.00	57,800.00										14,280.00							14,280.00	72,080.00
BA989F	Y	2/28/2022	6/30/2022	Randstad	C3292	76,960.00	30,414.00	13,024.00																13,024.00	43,438.00
BA4EB6		7/1/2021	6/30/2022	NASWA	C3293	16,200.00	-						16,200.00											16,200.00	16,200.00
BA8A51	Y	2/21/2022	6/30/2022	3K Technologies	C3299	74,880.00	40,896.00	12,672.00																12,672.00	53,568.00
BAC88E		3/31/2022	6/30/2022	Tal Search Group	C3308	82,160.00	16,906.00	12,482.00																12,482.00	29,388.00
C0062A		7/1/2022	6/30/2023	Tal Search Group	C3308	55,616.00	-								26,939.00	7,169.25		7,169.25		7,169.25		14,338.50		55,616.00	55,616.00
BADE51	Y	5/1/2022	6/30/2022	Gejits Infotech Inc.	C3311	32,785.00	17,264.00	14,608.00																14,608.00	31,872.00
C00A12	Y	7/1/2022	6/30/2023	Gejits Infotech Inc.	C3311	172,640.00			13,280.00						38,927.00	30,108.25	25,232.00	25,674.67	11,288.00	28,773.33		28,773.33		146,273.67	146,273.67
		7/1/2022	6/30/2023	Pending	C3315	-	-																	-	-
BB0559		5/10/2022	6/30/2022	Gejits Infotech Inc.	C3326	52,200.00	5,400.00	8,906.25																8,906.25	14,306.25
C00670		7/1/2022	6/30/2023	Gejits Infotech Inc.	C3326	34,500.00									13,312.50	10,593.76		7,062.50		7,062.50		7,062.50		34,500.00	34,500.00
BAF96A		5/6/2022	6/30/2022	Vitaver	C3347	25,200.00	4,608.00	10,368.00		7,488.00														17,856.00	22,464.00
C003CF		7/1/2022	6/30/2023	Vitaver	C3347	161,424.00	-								12,096.00	37,332.00	56,448.00	13,452.00		13,452.00		26,904.00		122,352.00	122,352.00
C02917		7/1/2022	6/30/2023	SGS Technologies	C3351	259,200.00	-						35,200.00		46,400.00	44,400.00	15,200.00	21,600.00		21,600.00		43,200.00		183,200.00	183,200.00
		7/1/2022	6/30/2023	Pending	C3353	-	-																	-	-
		7/1/2022	6/30/2023	Pending	C3354	-	-																	-	-
C00A20		7/1/2022	6/30/2023	Tal Search Group	C3364	205,920.00	-			18,612.00			15,840.00		45,243.00	31,556.25	29,304.00	17,160.00		17,160.00		17,160.00		160,479.00	160,479.00
BAC88D		3/31/2022	6/30/2022	Digital Intelligence Systems	C3368	81,120.00	23,166.00	12,519.00																12,519.00	35,685.00
C001AC		7/1/2022	6/30/2023	Digital Intelligence Systems	C3368	43,836.00	-			11,349.00			1,248.00		10,452.00	5,196.75		6,929.00		6,929.00		6,929.00		43,836.00	43,836.00
C004C7	Y	7/1/2022	6/30/2023	Vcarve	C3393	149,760.00	-			13,248.00			12,186.00		21,492.00	25,708.50	23,346.00	26,496.00	11,556.00	26,496.00		26,496.00		134,820.00	134,820.00
BB2B49		5/27/2022	6/30/2022	Randstad	C3408	20,566.65	1,687.52	17,718.96																17,718.96	19,406.48
C00AF7		7/1/2022	6/30/2023	Randstad	C3408	252,811.59	-			19,195.54			15,187.68		48,094.32	42,583.51	15,187.68	21,067.63	20,250.24	21,067.63		42,135.27		181,935.75	181,935.75
C02125	Y	7/1/2022	6/30/2023	RamcoTek	C3432	195,520.00	-						31,819.00		39,433.00	31,067.00	44,368.00	26,633.33		26,633.33		26,633.34		195,520.00	195,520.00
C0154E		7/1/2022	6/30/2023	Randstad	C3433	153,920.00	-		11,914.00				12,358.00		36,852.00	23,199.00	20,757.00	24,013.00	12,284.00	30,213.00		29,542.00		153,920.00	153,920.00
C01577		7/1/2022	6/30/2023	3K Technologies	C3434	149,760.00	-			13,248.00			24,192.00		21,888.00	22,608.00	22,464.00	22,656.00	11,520.00	22,656.00		33,792.00		149,760.00	149,760.00
C0742A		10/1/2023	6/30/2023	Tal Search Group	C3435	164,320.00	-						11,376.00		11,376.00	35,392.00	23,621.00	12,482.00		12,482.00		24,964.00		96,301.00	96,301.00
C0D128		10/24/2022	6/30/2023	Tal Search Group	C3436	162,240.00	-								11,856.00	37,596.00	34,320.00	11,856.00		11,856.00		23,712.00		93,600.00	93,600.00
	Y	7/1/2022	6/30/2023	Pending	C3437	-	-																	-	-
C01EFB		7/1/2022	6/30/2023	Vitaver	C3438	208,000.00	-						17,600.00		24,400.00	41,500.00	56,800.00	17,333.33	18,400.00	17,333.33		34,666.67		169,200.00	169,200.00
C01EFE		7/1/2022	6/30/2023	IT Trailblazers	C3439	135,320.00	-			11,960.00			10,920.00		20,280.00	23,040.00	40,170.00	17,330.00		17,330.00		17,330.00		135,320.00	135,320.00
C004C9		7/1/2022	6/30/2023	Tal Search Group	C3440	244,260.00	-			25,392.00			21,114.00		39,330.00	39,606.00	76,452.00	20,355.00		20,355.00		40,710.00		243,708.00	243,708.00
C0211A	Y	7/1/2022	6/30/2023	V2Soft	C3441	144,664.00	-			12,797.20			12,310.35		22,256.00	24,325.11	43,190.55	12,055.33		12,055.33		24,110.67		138,775.43	138,775.43
C01EFC		7/1/2022	6/30/2023	3K Technologies	C3442	145,600.00	-						5,600.00		11,200.00	32,200.00								16,800.00	16,800.00
C000BF		7/1/2022	6/30/2023	Tal Search Group	C3443	203,840.00	-			18,130.00			19,502.00		33,957.00	33,062.75	74,725.00	19,175.33		19,175.33		19,175.34		203,840.00	203,840.00
C0697D		7/1/2022	6/30/2023	Ardent	C3444	176,800.00	-						21,760.00		17,340.00	34,425.00	22,270.00	14,733.33	13,600.00	15,866.67		29,466.67		120,303.34	120,303.34
C01F00	Y	7/1/2022	6/30/2023	Vitaver	C3445	176,800.00	-			15,640.00			790.08		14,509.92	36,465.00	59,840.00	14,733.33		14,733.33		29,466.67		149,713.33	149,713.33
C027ED		7/1/2022	6/30/2023	3K Technologies	C3453	193,500.00	-			13,800.00			12,600.00		21,637.50	36,365.63	46,275.00	16,125.00		16,125.00		32,250.00		158,812.50	158,812.50
BB40EF		6/1/2022	6/30/2022	Tal Search Group	C3466	22,000.00	-	21,812.50																21,812.50	21,812.50
C0307E		7/1/2022	6/30/2023	Tal Search Group	C3466	265,500.00	-			25,812.50			37,250.00		32,682.00	42,438.88	90,000.00	26,585.17		26,585.17		26,585.16		265,500.00	265,500.00
C085B0		10/1/2022	6/30/2023	Tal Search Group	C3506	218,400.00	-						16,905.00			45,823.75	40,398.75	18,200.00		18,200.00					

C08C6F		11/1/2022	6/30/2023	Kyra Solutions	C3518	206,960.00	-						16,815.50	47,536.13	52,138.00	17,246.67		17,246.67		34,493.33		137,940.17	137,940.17			
C00670	Y	7/1/2022	6/30/2023	Gejits Infotech Inc.	C3519	34,500.00	-	8,850.00														8,850.00	8,850.00			
C07157		8/15/2022	6/30/2023	Gejits Infotech Inc.	C3519	156,000.00	-				24,825.00			32,793.75	44,943.75	28,743.75		28,743.75		28,743.75		156,000.00	156,000.00			
C0F7CF		7/1/2022	6/30/2023	NASWA	C3616	32,400.00	-							16,200.00		16,200.00	10,800.00	16,200.00		5,400.00		32,400.00	32,400.00			
C102F1		12/19/2022	6/30/2023	GCOM	C3621	183,040.00	-							22,880.00	13,992.00	22,880.00		22,880.00		22,880.00		82,632.00	82,632.00			
PR196017		3/13/2023	6/30/2023	Optimum Software	C3641	164,320.00	-							13,693.33		13,693.33		13,693.33		27,386.67		54,773.33	54,773.33			
C0C9C2		2/9/2023	6/30/2023	Gejits Infotech Inc.	C3563	187,200.00	-							31,200.00	24,660.00	15,600.00	14,040.00	17,160.00		31,200.00		87,060.00	87,060.00			
C0DC83		11/14/2022	6/30/2023	KLC Consulting	C3609	104,328.00	-							23,184.00	22,528.50	11,592.00		11,592.00		23,184.00		68,896.50	68,896.50			
N/A		7/1/2022	6/30/2023	DEO CTO	N/A	195,000.00	-				20,631.82	(33,731.93)	152,752.39	30,000.00		53,536.78		27,904.00		2,193.52		223,286.58	223,286.58			
								1,415,794.88	268,374.26	46,364.00	225,992.24	14,280.00	20,631.82	417,945.61	(33,731.93)	896,900.63	1,040,636.97	1,082,191.23	645,357.87	109,458.24	631,717.09	-	876,139.15	-	5,018,663.64	6,434,458.52

PROJECT:	CLOUD MIGRATION
FUNDING:	Modernization GR(UCMOD) / Modernization ARPA(FRR21)
STATUS:	In Progress

MOD GR							July	August	September	October	November	December	January	February	March	April	May	June	SFY 22/23 Oblig	2-Year Cost					
PO	Rec	Start Date	End Date	Vendor	Contract	Description	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 22/23 Oblig	2-Year Cost	
B9E668	N	9/23/2021	9/23/2021	SHI	-	Visio Licenses for Business Analysts	2,924.55								-		-		-		-		-	2,924.55	
B972A9	N	7/1/2021	6/30/2022	Presidio	-	Palo Alto Panorama+VM Series	44,677.60								-		-		-		-		-	44,677.60	
BA2ED4	P	11/30/2021	11/29/2022	Mythics	C3280	Oracle Universal Licensing & Support for Connect Database	4,513,720.89								-		-		-		-		-	4,513,720.89	
BA346A	Y	1/1/2022	12/31/2022	OpenText Corp	C3284	HP Exstream Software (for Cloud Migration - formerly BA2C09)	60,505.32								-		-		-		-		-	60,505.32	
C085F4	Y	7/1/2022	6/30/2023	OpenText Corp	C3501	Annual renewal of support & maint over the OpenText HP Exstream software for CONNECT	-					134,684.00											134,684.00	134,684.00	
BAB434	Y	4/1/2022	6/30/2022	OpenText Corp	C3306	OpenText - HP ExStream Consultant Services	4,325.50	1,336.75							-		-		-		-		1,336.75	5,662.25	
C0BB55	Y	6/30/2022	8/31/2022	OpenText Corp	C3306	OpenText - HP ExStream Consultant Services	-																-	-	
BAF047		6/8/2022	6/7/2023	Insight Public Sector		DocuSign Enterprise Pro Edition - Envelope	2,418.91																-	2,418.91	
C049C4	N	7/1/2022	10/15/2022	Robert Mark Technologies	C3469	Automic V21 Update	-		7,875.00			3,975.00		13,250.00		-	5,000.00						30,100.00	30,100.00	
C0BB56	N	7/1/2022	10/15/2022	Robert Mark Technologies	C3469	Automic V21 Update	-									1,400.00							1,400.00	1,400.00	
BA1497/C0332A	N	10/29/2021	6/30/2022	GTS	C2191 - A9	IVR Contact Center as a Service - GTS Deliverable-Based Genesys Migration Proposal	-								-		-		-		-		-	-	
						Deliverable 18 - Planning and Workshops:	84,494.30			9,388.26													9,388.26	93,882.56	
						Deliverable 19 - Functionality Requirements	73,693.67			8,188.19													8,188.19	81,881.86	
						Deliverable 20 - Genesys Cloud Build and GTS Voice Integration	86,760.01			9,640.00													9,640.00	96,400.01	
						Deliverable 21 - Call Routing, Callback & Reporting Setup	-			44,260.07				398,340.66									442,600.73	442,600.73	
						Deliverable 22 - Digital Solutions - Email and Web Chat	61,909.20			6,878.80													6,878.80	68,788.00	
						Deliverable 23 - Self-Service IVR Application	-		542,470.36	60,274.48													602,744.84	602,744.84	
						Deliverable 24 - Proactive Notifications	141,891.48			15,765.72													15,765.72	157,657.20	
						Deliverable 25 - Quality Assurance	-		71,770.09	7,974.45													79,744.54	79,744.54	
						Deliverable 26 - Workforce Management	-		74,019.15	8,224.35													82,243.50	82,243.50	
						Deliverable 27 - Train-the-Trainer	-	9,180.00		1,020.00													10,200.00	10,200.00	
						Deliverable 28 - Deployment Support	-			960.00				8,640.00									9,600.00	9,600.00	
						Deliverable 29 - Knowledge Transfer	-		6,480.00	720.00													7,200.00	7,200.00	
<b>Totals</b>						<b>Totals</b>	<b>5,077,321.43</b>	<b>10,516.75</b>	<b>702,614.60</b>	<b>173,294.32</b>	<b>-</b>	<b>-</b>	<b>138,659.00</b>	<b>-</b>	<b>420,230.66</b>	<b>-</b>	<b>1,400.00</b>	<b>5,000.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>1,451,715.33</b>	<b>6,529,036.76</b>	
MOD ARPA							July	August	September	October	November	December	January	February	March	April	May	June	SFY 22/23 Oblig	2-Year Cost					
PO	Rec	Start Date	End Date	Vendor	Contract #	Description	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 22/23 Oblig	2-Year Cost	
COED7E	P	11/30/2022	11/29/2023	Mythics	C3615	Oracle Universal Licensing & Support for Connect Database	-								-	283,176.16	283,176.16		283,176.16		283,176.15		1,132,704.63	1,132,704.63	
TBD	N	12/30/2022	6/30/2023	Dasher Technologies		UFT Licenses for Modernization	-								95,970.56		95,970.56						95,970.56	95,970.56	
C04B37	N	7/1/2022	10/15/2022	GTS	C2191-A10	Deliverable 30 - Genesys Cloud Project: Genesys DX Chatbot	-								70,523.00		70,523.00						70,523.00	70,523.00	
						Deliverable 31 - Genesys Cloud Project: Genesys Cloud Visual IVR	-								32,523.00		32,523.00						32,523.00	32,523.00	
						Deliverable 32 - Genesys Cloud Project: Success KPI Reporting	-					4,745.30			42,707.70		42,707.70						47,453.00	47,453.00	
						Deliverable 33 - GTS Importer Tool	-			45,000.00													45,000.00	45,000.00	
						E911 for VoIP	-			99,000.00													99,000.00	99,000.00	
						Genesys DX Chatbot Subscription	-							278,134.00									278,134.00	278,134.00	
						Geofluent Chatbot Subscription	-							69,348.00									69,348.00	69,348.00	
C1183A	Y	1/1/2023	12/31/2023	GTS	C2191-A11R1	GTS - RA IVR Enhancements	-								5,506,895.00	5,506,895.00							5,506,895.00	5,506,895.00	
<b>Totals</b>						<b>Totals</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>144,000.00</b>	<b>-</b>	<b>-</b>	<b>4,745.30</b>	<b>-</b>	<b>347,482.00</b>	<b>5,748,619.26</b>	<b>5,790,071.16</b>	<b>524,900.42</b>	<b>-</b>	<b>283,176.16</b>	<b>-</b>	<b>283,176.15</b>	<b>-</b>	<b>7,377,551.19</b>	<b>7,377,551.19</b>

**PROJECT:** Business Process Optimization(BPO)  
**FUNDING:** Modernization GR(UCMOD) / Modernization ARPA(FRR21)  
**STATUS:** Complete Pending Payments

MOD GR								July	August	September	October	November	December	January	February	March	April	May	June	SFY 22/23 Oblig	2-Year Cost				
PO	Rec	Start Date	End Date	Vendor	Contract #	Description	Contract Amount	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual		
BA778C		2/24/2022	6/30/2022	KPMG	C3256	Deliverable 1 - Kick-off Meeting, Agenda, Presentation, and Minutes	10,000.00	10,000.00								-		-		-			-	10,000.00	
						Deliverable 2 - Project Management Plan	35,000.00	35,000.00															-	35,000.00	
						Deliverable 3 - Staffing Plan	10,000.00	10,000.00															-	10,000.00	
						Deliverable 4 - Lessons Learned Collection Process	10,000.00	10,000.00															-	10,000.00	
						Deliverable 6 - As-Is Reports for Core Claims	240,000.00	80,000.00	40,000.00		80,000.00						40,000.00						160,000.00	240,000.00	
						<b>Totals</b>	<b>305,000.00</b>	<b>145,000.00</b>	<b>40,000.00</b>	<b>-</b>	<b>80,000.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>40,000.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>160,000.00</b>	<b>305,000.00</b>

MOD ARPA								July	August	September	October	November	December	January	February	March	April	May	June	SFY 22/23 Oblig	2-Year Cost				
PO	Rec	Start Date	End Date	Vendor	Contract #	Description	Contract Amount	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual		
C054D5		7/1/2022	6/30/2023	KPMG	C3256	Deliverable 5 - Conduct Working Sessions	140,000.00	-		84,000.00	56,000.00												140,000.00	140,000.00	
						Deliverable 7 - Final As-Is Report	200,000.00	-			200,000.00													200,000.00	200,000.00
						Deliverable 8 - Assessment Report	100,000.00	-			-					100,000.00	100,000.00							100,000.00	100,000.00
						Deliverable 9 - To-Be Business Processes and	160,000.00	-			120,000.00					40,000.00								160,000.00	160,000.00
						Deliverable 10 - Conduct working sessions for	140,000.00	-			28,000.00	28,000.00				56,000.00	28,000.00	28,000.00						140,000.00	140,000.00
						Deliverable 11 - Potential Benefit Analysis	100,000.00	-			100,000.00													100,000.00	100,000.00
						Deliverable 12 - To-Be Report for Core Claims	160,000.00	-	40,000.00							40,000.00	80,000.00	120,000.00						200,000.00	200,000.00
						Deliverable 13 - Final To-Be Reports	200,000.00	-			-					200,000.00	200,000.00	-		-				200,000.00	200,000.00
						Deliverable 14 - Update Previously Developed As-Is Business Process Requirements	100,000.00	-			100,000.00													100,000.00	100,000.00
						Deliverable 15 - Requirements Management Plan	28,000.00	-								28,000.00	28,000.00	-		-				28,000.00	28,000.00
						Deliverable 16 - Transition Plan	15,000.00	-								15,000.00	15,000.00	-		-				15,000.00	15,000.00
						<b>Totals</b>	<b>1,343,000.00</b>	<b>-</b>	<b>40,000.00</b>	<b>84,000.00</b>	<b>604,000.00</b>	<b>28,000.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>136,000.00</b>	<b>451,000.00</b>	<b>491,000.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>1,383,000.00</b>	<b>#####</b>

<b>Grand Total</b>							<b>1,648,000.00</b>	<b>145,000.00</b>	<b>80,000.00</b>	<b>84,000.00</b>	<b>684,000.00</b>	<b>28,000.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>136,000.00</b>	<b>451,000.00</b>	<b>531,000.00</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>1,543,000.00</b>	<b>#####</b>
--------------------	--	--	--	--	--	--	---------------------	-------------------	------------------	------------------	-------------------	------------------	----------	----------	----------	-------------------	-------------------	-------------------	----------	----------	----------	----------	----------	----------	---------------------	--------------

**PROJECT** System Software Integrator  
**FUNDING** Modernization GR(UCMOD) / Modernization ARPA(FRR21)  
**STATUS:** In Progress

MOD GR								July	August	September	October	November	December	January	February	March	April	May	June							
PO	Rec	Start Date	End Date	Vendor	Contract #	Description	Contract Amount	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 22/23 Oblig	2-Year Cost	
BAD55C	N	4/4/2022	6/30/2022	Peraton	C3272	SSI - System Software Integrator																		-	-	
						D1: Project Kickoff Meeting	13,633.50	13,633.50																-	13,633.50	
						D2: Project Management Plan	13,278.70	13,278.70																-	13,278.70	
						D3: Staffing Plan	6,825.40	6,825.40																-	6,825.40	
<b>Totals</b>							<b>33,737.60</b>	<b>33,737.60</b>																-	33,737.60	
MOD ARPA								July	August	September	October	November	December	January	February	March	April	May	June							
PO	Rec	Start Date	End Date	Vendor	Contract #	Description	Contract Amount	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 22/23 Oblig	2-Year Cost	
C017A5	N	7/1/2022	6/30/2023	Peraton	C3272	SSI - System Software Integrator		-	-															-	-	
						D4: Technical Requirements	83,422.56	-	-		83,422.56													83,422.56	83,422.56	
						D5: Technical Requirements Working Sessions	94,644.25	-	-			94,644.25												94,644.25	94,644.25	
						D6: Final To Be Technical Requirements Report	97,941.80	-	-									97,941.80						97,941.80	97,941.80	
						D7: Design Documentation	80,333.11	-	-									80,333.11						80,333.11	80,333.11	
						D8: Infrastructure Performance Requirements	42,109.86	-	-									42,109.86						42,109.86	42,109.86	
						D9: Requirements Management Plan	76,269.25	-	76,269.25															76,269.25	76,269.25	
						D10: Architectural Standards	46,986.59	-	-					46,986.59										46,986.59	46,986.59	
						D11: Performance Benchmarks	277,855.28	-	-									277,855.28						277,855.28	277,855.28	
						D12: Architecture Change Control and Approval Process	148,221.12	-	-					148,221.12										148,221.12	148,221.12	
						D13: Oversight and Monitoring Modernization Projects	952,077.12	-	-					238,019.28	119,009.64	119,009.64	119,009.64	119,009.64	119,009.64			357,028.92		952,077.12	952,077.12	
						D14: Integration Testing	905,285.49	-	-													905,285.49		905,285.49	905,285.49	
						D15: Integration	702,775.31	-	-													702,775.31		702,775.31	702,775.31	
						D16: Technology Selection	188,468.40	-	-					188,468.40										188,468.40	188,468.40	
						D17: Procurement Support	250,629.79	-	-					250,629.79										250,629.79	250,629.79	
						D18: Transition Plan	32,103.50	-	-				32,103.50											32,103.50	32,103.50	
<b>Totals</b>							<b>3,979,123.43</b>		76,269.25	-	83,422.56	-	126,747.75	-	872,325.18	-	119,009.64	617,249.69	119,009.64	119,009.64	-	1,965,089.72	-	3,979,123.43	3,979,123.43	
<b>Grand Total</b>							<b>4,012,861.03</b>	<b>33,737.60</b>	-	76,269.25	-	83,422.56	-	126,747.75	-	872,325.18	-	119,009.64	617,249.69	119,009.64	119,009.64	-	1,965,089.72	-	3,979,123.43	4,012,861.03

PROJECT: Identity Management and Access  
 FUNDING: Modernization GR(U)CMOD / Modernization ARPA(FRR21)  
 STATUS: In Progress

MOD GR UCMOD							July	August	September	October	November	December	January	February	March	April	May	June			
PO	Rec	Start Date	End Date	Vendor	Contract #	Description	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Projected	Actual	Projected	Actual	SFY 22/23 Oblig	2-Year Cost
BSE6EC	N	9/27/2021	9/27/2022	Insight Public Sector	C3231	WhoAm Consulting Services for B2C for C2C (Phase 1)	150,785.00	6,095.00	-	-	-	-	-	-	-	-	-	-	-	6,095.00	156,880.00
<b>Totals</b>							<b>150,785.00</b>	<b>6,095.00</b>	-	-	-	-	-	-	-	-	-	-	-	<b>6,095.00</b>	<b>156,880.00</b>

MOD ARPA FRR21							July	August	September	October	November	December	January	February	March	April	May	June				
PO	Rec	Start Date	End Date	Vendor	Contract #	Description	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Projected	Actual	Projected	Actual	SFY 22/23 Oblig	2-Year Cost	
TBD				TBD	C3231	WhoAm Consulting Services for B2C for C2C (Phase 1)														-	-	
				TBD		Professional Services - Security Policy and Procedures											205,333.33	205,333.33	205,333.33	616,000.00	616,000.00	
<b>Totals</b>							-	-	-	-	-	-	-	-	-	-	205,333.33	205,333.33	205,333.33	616,000.00	616,000.00	
<b>Grand Total</b>							<b>150,785.00</b>	<b>6,095.00</b>	-	-	-	-	-	-	-	-	-	<b>205,333.33</b>	<b>205,333.33</b>	<b>205,333.33</b>	<b>622,095.00</b>	<b>772,880.00</b>

PROJECT: CX/UX  
 FUNDING: Modernization ARPA(FRR21)  
 STATUS: In progress

Incremental CX/UX Mobile-Responsive Software Transformation								July	August	September	October	November	December	January	February	March	April	May	June	SFY 22/23 Oblig	2-Year Cost				
PO	Recurring	Start Date	End Date	Vendor	Contract #	Description	Contract Amount	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 22/23 Oblig	2-Year Cost
<b>CX/UX Tech</b>																									
C16379		2/10/2023	6/30/2025	Strategic Cloud Communications	C3505	D1 Project Kick Off Meeting	330,607.00	-										330,607.00						330,607.00	330,607.00
						D2 Project Management Plan	811,879.40	-										330,607.00		14,438.17				345,045.17	345,045.17
						D3 Project Schedule	324,751.20	-												132,243.00		5,775.25		138,018.25	138,018.25
						D4 Staffing Plan	-	-																-	-
						D5 Business Continuity Plan	132,243.00	-										-		324,751.20				324,751.20	324,751.20
						D6 Infrastructure Report	324,751.20	-									324,751.20							324,751.20	324,751.20
						D7 Performance Requirements	-	-																-	-
						D8 Joint Application Development Sessions	1,232,886.40	-										462,850.00				23,101.09		485,951.09	485,951.09
						D9 Requirements Report	492,903.35	-									492,903.35							492,903.35	492,903.35
						D10 Requirements Management Plan	66,121.00	-														66,121.00		66,121.00	66,121.00
						D11 Design Specifications Document	811,879.30	-												811,879.30				811,879.30	811,879.30
						D12 Detailed Technology Projects Screen and Design Documents	487,128.15	-														198,364.00		198,364.00	198,364.00
						D13 System Architecture and Design Document	324,751.20	-												324,751.20				324,751.20	324,751.20
						D14 Interface Design Description and Integration Specification Document	324,751.00	-												324,751.00				324,751.00	324,751.00
						D15 Interface Control Document	324,751.20	-												324,751.20				324,751.20	324,751.20
						D16 Architectural Review Document	324,751.00	-									324,751.00							324,751.00	324,751.00
						D17 Data Conversion Strategy Document	-	-																-	-
						D18 Business Rules Catalog	288,764.10	-														144,382.05		144,382.05	144,382.05
						D19 Reemployment Assistance Interfaces	487,128.10	-									487,128.10							487,128.10	487,128.10
						D20 Continuous Modernization Strategic Roadmap	-	-																-	-
						D21 Installation and Configuration Plan	-	-																-	-
						D22 Migration Strategy	-	-																-	-
						D23 Testing Plan	487,128.10	-													207,026.92			207,026.92	207,026.92
						D24 Test Results Report	324,751.20	-														132,243.00		132,243.00	132,243.00
						D25 Operational Readiness Test Plan and Schedule	324,751.20	-														132,243.00		132,243.00	132,243.00
						D26 Lessons Learned Document	-	-																-	-
						D27 User Manual	324,751.20	-																-	-
						D28 Operating Procedures	324,751.20	-																-	-
						D29 Training Materials	324,751.20	-																-	-
						D30 Business Rules Engine	872,146.30	-																-	-
						D31 Integration Platform Solution	1,948,511.60	-														1,948,511.60		1,948,511.60	1,948,511.60
						D32 Mobile Responsive User Interface	4,221,772.40	-														4,221,772.40		4,221,772.40	4,221,772.40
						Maint & Ops	10,360,372.00	-																-	-
C141FF		2/10/2023	6/30/2025	Strategic Cloud Communications	C3505	Mulesoft	2,252,320.84	-								563,080.21	563,080.21							563,080.21	563,080.21
<b>Totals</b>							#####	-	-	-	-	-	-	-	-	563,080.21	563,080.21	2,753,597.65	-	2,464,591.99	-	6,872,513.39	-	12,653,783.24	12,653,783.24
<b>CX/UX Comms</b>																									
C127FC		1/10/2023	6/30/2024	KPMG	C3606	D1: Project Kickoff Meeting	15,000.00	-										10,000.00	10,000.00					10,000.00	10,000.00
						D2: Project management Plan	52,500.00	-										35,000.00						35,000.00	35,000.00
						D3: Project Schedule	45,000.00	-										30,000.00						30,000.00	30,000.00
						D4: Public Relations Material	400,000.00	-														200,000.00		200,000.00	200,000.00
						D5: Outreach Campaign	400,000.00	-														200,000.00		200,000.00	200,000.00
C11757		1/10/2023	6/30/2024	Beacon Systems, Inc	C3630	D1: Project Kick-off Meeting	-	-																-	-
						D2: Project Management Plan	-	-																-	-
						D3: Project Schedule	-	-																-	-
						D4: Content Design Sessions	1,220,084.95	-										621,732.60						621,732.60	621,732.60
						D5: Logo Development and Brand Guidelines	266,162.30	-										138,162.80						138,162.80	138,162.80
						D6: Plain Language Development and Translation	1,183,465.95	-										152,607.12		152,607.12		50,869.04		356,083.28	356,083.28
<b>Totals</b>							-	-	-	-	-	-	-	-	-	-	-	987,502.52	10,000.00	152,607.12	-	450,869.04	-	1,590,978.68	1,590,978.68

					Grand Total		-	-	-	-	-	-	-	-	563,080.21	563,080.21	3,741,100.17	10,000.00	2,617,199.11	-	7,323,382.43	-	14,244,761.92	14,244,761.92
--	--	--	--	--	-------------	--	---	---	---	---	---	---	---	---	------------	------------	--------------	-----------	--------------	---	--------------	---	---------------	---------------

PROJECT: Security Architecture Review  
 FUNDING: Modernization ARPA(FRR21)  
 STATUS: Complete

Security Architecture Review Services							July	August	September	October	November	December	January	February	March	April	May	June	SFY 22/23 Oblig	2-Year Cost				
PO	Rec	Start Date	End Date	Vendor	Contract	Description	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 22/23 Oblig	2-Year Cost
C097B5		4/15/2022	4/14/2023	EY	C3257	Consultant Services	-	-							-		-		-		-		-	-
						D1: Project Plan		21,240.00															21,240.00	21,240.00
						D3: Assessment of Security Controls Report					169,920.00												169,920.00	169,920.00
						D4: Skills and Capabilities Assessment						106,200.00											84,960.00	84,960.00
						D5: Security Controls & Implementation Roadmap						84,960.00											106,200.00	106,200.00
						D6: Training and Capabilities Improvement Plan	-					42,480.00			-		-		-		-		42,480.00	42,480.00
						<b>Totals</b>	-	21,240.00			#####	233,640.00			-		-		-		-		424,800.00	424,800.00

PROJECT: SDLC Cloud OPS  
 FUNDING: Modernization ARPA(FRR21)  
 STATUS: In Progress

SDLC - DevOps						July	August	September	October	November	December	January	February	March		April		May		June		SFY 21/22 Oblig	SFY 22/23 Oblig	2-Year Cost
PO	Rec	Start Date	End Date	Vendor	Contract #	Description	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Actual	Actual	Actual
C10EB1		12/15/2022	6/30/2023	Insight Public Sector		SonarQube Enterprise Edition	-							55,851.06		55,851.06		-		-		-	55,851.06	55,851.06
C0A929	Y	10/1/2022	6/30/2023	CRI Advantage		ServiceNow Software License Subscriptions	-						374,598.27	-		-		-		-		-	374,598.27	374,598.27
<b>Totals</b>						-							374,598.27	55,851.06	-	55,851.06	-	-	-	-	-	430,449.33	430,449.33	

PROJECT: IV&V for Modernization  
 FUNDING: Modernization ARPA(FRR21)  
 STATUS: In Progress

IV&V Services for RA Modernization								July	August	September	October	November	December	January	February	March	April	May	June			SFY 22/23 Oblig	2-Year Cost		
PO	Recurring	Start Date	End Date	Vendor	Contract #	Description	Contract Amount	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual		
EP2435	N	7/30/2021	6/30/2022	Gartner	C3454	IV&V Services for RA Modernization	2,436,060.00	-						644,449.10		644,448.60	-	214,816.20	214,816.20		214,816.20		502,713.70	#####	2,436,060.00
							406,980.00																406,980.00	406,980.00	406,980.00
<b>Totals</b>								-	-	-	-	-	644,449.10	-	644,448.60	-	214,816.20	214,816.20	-	214,816.20	-	909,693.70	#####	2,843,040.00	

PROJECT: SOA and API Layer  
 FUNDING: Modernization ARPA(FRR21)  
 STATUS: Continuous Mod

SOA and API Layer							July	August	September	October	November	December	January	February	March	April	May	June							
PO	Recurring	Start Date	End Date	Vendor	Contract #	Description	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 22/23 Proj	SFY 22/23 Actual	2-Year Cost
	Y	12/22/2021	7/31/2022			API Layer Software Tool - ISF Estimate	-								-		-				-		-	-	-
	Y		7/31/2022			Configuration/Professional Services	-										-			-		-	-	-	-
							-								-		-			-		-	-	-	-
						<b>Totals</b>	-								-		-			-		-	-	-	-

PROJECT: Rules Engine  
 FUNDING: Modernization ARPA(FRR21)  
 STATUS: Continuous Mod

Rules Engine						July	August	September	October	November	December	January	February	March	April	May	June	SFY 21/22 Oblig	SFY 22/23 Proj	SFY 22/23 Actual	2-Year Cost		
PO	Rec	Start Date	End Date	Vendor	Contract #																		
	Y	12/22/2021	7/31/2022			Rules Engne Software Tool - ISF Estimate	-							-		-			-		-		-
	Y		7/31/2022			Configuration/Professional Services	-							-		-			-		-		-
							-							-		-			-		-		-
						<b>Totals</b>	-							-		-			-		-		-

PROJECT: Archive and Purge  
 FUNDING: Modernization ARPA(FRR21)  
 STATUS: Continuous Mod

Archive and Purge							July	August	September	October	November	December	January	February	March	April	May	June	SFY 22/23 Oblig	2-Year Cost				
PO	Rec	Start Date	End Date	Vendor	Contract	Description	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 22/23 Oblig	2-Year Cost
						Archive Software/Hardware Tool - ISF Estimate	-																-	-
						Configuration/Professional Services	-																-	-
							-								-		-		-				-	-
						<b>Totals</b>	-								-		-		-				-	-

PROJECT: Master Data Management

FUNDING: Modernization ARPA (FRR21)

STATUS: In Progress

Master Data Management and Interoperability							July	August	September	October	November	December	January	February	March	April	May	June	SFY 22/23 Oblig	2-Year Cost				
PO	Rec	Start Date	End Date	Vendor	Contract	Description	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 22/23 Oblig	2-Year Cost
							-																-	-
							-																-	-
							-								-		-		-		-		-	-
						<b>Totals</b>	-								-		-		-		-		-	-





PROJECT: Security Architecture Audit  
 FUNDING: Modernization ARPA(FRR21)  
 STATUS: Complete

Security Architecture Audit Project							July	August	September	October	November	December	January	February	March	April	May	June							
PO	Rec	Start Date	End Date	Vendor	Contract	Description	SFY 21/22 Oblig	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	SFY 22/23 Proj Cost	SFY 22/23 Actual	2-Year Cost
						Does not start until FY 22/23 - ISF Estimate	-																-	-	-
							-								-		-			-			-	-	-
						<b>Totals</b>	-								-		-			-			-	-	-

Date	Project	Source	PO/Contract	Description	Net Change
8/24/2022	Security Architecture Review Services	ARPA		Adjusted deliverable payout projections/ no cost change	-
8/24/2022	System and Software Integrator	UCMOD		Adjusted deliverable payout projections/ no cost change	-
9/1/2022	UCMNT	UCMNT	BAF9D7	Increased cost	55,793.28
9/1/2022	UCMNT	UCMNT	BAAF2A	Removed projection / Charged to RA Operations	(340,108.87)
9/8/2022	SDLC Dev OPS	ARPA	PR88502	Added Service Now License Projection	374,598.27
9/12/2022	UCIVV	UCIVV	C3108	Reduced Projection to match contract amount	(7,200.00)
9/12/2022	UCMNT	UCMNT	C3390	Reduced Projection / Not yet procured	(16,421.83)
9/12/2022	Shared Resouce - Aug	UCMOD	C3315	Removed August and September Projection - Not Filled	(31,200.00)
9/12/2022	Shared Resouce - Aug	UCMOD	C3354	Removed August and September Projection - Not Filled	(31,200.00)
9/12/2022	Cloud Migration	UCMOD	C3501	Added contract & replaced old projection for Open Text Software	74,179.52
9/12/2022	UCMNT	UCMNT	C0869C	Added contract & replaced old projection for Open Text Licenses	12,786.78
9/12/2022	UCMNT	UCMNT	C086F1	Added contract & replaced old projection for Open Text Support	7,938.26
9/23/2022	UCMNT	UCMNT	C3477 / C01823	Added new contract and updated projection for Azure Cloud Services(Commercial)	(50,000.00)
9/23/2022	UCMNT	UCMNT	PR88502	Added actual PR and updated projection	5,598.27
10/5/2022	UCMNT	UCMNT	C3415 / C032E6	Added FY 22/23 PO and adjusted projection to actual contract amount	(68,451.98)
10/5/2022	UCMNT	UCMNT	C3476 / C0B09F	Added FY 22/23 PO and replaced old projection	1,480,000.00
10/5/2022	UCMNT	UCMNT	B93501	Reduced projection based on usage volume	(72,000.00)
10/10/2022	UCMNT	UCMNT	Staff Aug	Removed 1st Q projections on positions not yet filled	(217,790.64)
10/10/2022	UCMNT	UCMNT	C3415/C032E6	Funding with RA Ops	(176,800.00)
10/10/2022	Shared Resouce - Aug	UCMOD	Multiple	Removed 1st Q projections on positions not yet filled	(73,514.76)
10/10/2022	UCMNT	UCMNT	Staff Aug	Funding with RA Ops	(542,961.04)
10/10/2022	RA Help Center	ARPA	N/A	Removed 1st Q projections	(300,000.00)
11/9/2022	RA Help Center	ARPA	N/A	Removed projection	(900,000.00)
12/2/2022	Master Data Management	ARPA		Adjusted deliverable payout projections/ no cost change	-
12/2/2022	CX/UX	ARPA		Adjusted deliverable payout projections/ no cost change	-
12/2/2022	Archive and Purge	ARPA		Adjusted deliverable payout projections/ no cost change	-
12/2/2022	SOA API Layer	ARPA		Adjusted deliverable payout projections/ no cost change	-
12/2/2022	IV&V for MOD	ARPA		Adjusted deliverable payout projections/ no cost change	-
12/2/2022	Shared Resouce - Aug	UCMOD	C3621	Added Contract for System Admin	183,040.00
12/2/2022	Shared Resouce - Aug	UCMOD	C3616	Added Contract for NASWA Consulting Services	32,400.00
12/2/2022	Shared Resouce - Aug	UCMOD	C3315	Removed projection	(140,400.00)
12/9/2022	UCMNT	UCMNT	PR121649	Added Alteryx Server sandbox 1 year Coverage Dates August 28, 2022 - August 27, 2023	12,301.00
12/9/2022	UCMNT	UCMNT	BAAF2A	Removed Box.com license projection(charged to Operations)	(210,646.21)
12/9/2022	UCMNT	UCMNT	BAC3E0	Removed Projection	(187,200.00)
12/9/2022	UCMNT	UCMNT	BA274B	Removed Projection	(75,659.60)
12/16/2022	Security Architecture Audit Pro	ARPA		Removed Projection	(374,544.12)
12/16/2022	Cloud Migration	ARPA		Added Projection IBM CloudPak(Filenet)	396,520.80
12/16/2022	Identity Access and Management	ARPA		Removed Savyint	(7,718,208.01)
12/16/2022	Cloud Migration	ARPA		Added tool projection	695,000.00

**Back of Bill**

	Category	
<b>RA Modernization</b>	<b>100270</b>	Grant
Maint & Ops	19,320,000	<b>UCMNT</b>
Modernization	15,510,000	<b>UCMOD</b>
IV&V	1,170,000	<b>UCIVV</b>
	<b>36,000,000</b>	

2202A SPECIAL CATEGORIES

REEMPLOYMENT ASSISTANCE SYSTEM MODERNIZATION  
FROM GENERAL REVENUE FUND . . . . 36,000,000

From the funds in Specific Appropriation 2202A, \$36,000,000 in nonrecurring funds from the General Revenue Fund is provided for the modernization of the reemployment assistance system that complies with section 282.206, Florida Statutes. Of these funds, \$19,320,000 is provided for increased maintenance and operations of the system, \$15,510,000 is provided for system modernization, and \$1,170,000 is provided to competitively procure a private sector provider with experience in conducting independent verification and validation (IV&V) services of public sector information technology projects to provide IV&V services for all department and vendor staff working to modernize and maintain the system. From these funds, \$31,170,000 shall be held in reserve, and \$4,830,000 is released to the department for ongoing maintenance and operations. The department is authorized to submit quarterly budget amendments requesting release of these funds pursuant to the provisions of chapter 216, Florida Statutes, and based on the department's planned quarterly expenditures. Release is contingent upon the procurement of the IV&V vendor and the approval of a detailed operational work plan and monthly spend plan that identifies all work activities and costs budgeted for Fiscal Year 2021-2022.

Quarterly IV&V reports shall include technical reviews of project deliverables submitted or accepted within the reporting period and assessments of the department's project management and governance. The IV&V contract shall require that all deliverables be simultaneously submitted to the executive director of the department, the Executive Office of the Governor's Office of Policy and Budget, the chair of the Senate Appropriations Committee, the chair of the House Appropriations Committee, and the Florida Digital Service. The contracted provider shall be made readily available to provide all project related data to the Florida Digital Service in support of their project oversight responsibilities pursuant to section 282.0051, Florida Statutes. The department shall provide monthly project status reports to the Executive Office of the Governor's Office of Policy and Budget, the chair of the Senate Appropriations Committee, the chair of the House Appropriations Committee, and the Florida Digital Service. Each status report must include ongoing system maintenance activities and progress made to date for each project milestone, deliverable, and task order, planned and actual completion dates, planned and actual costs incurred, and any current project issues and risks.

**RA Modernization - Back of Bill**

Modernization **56,400,000**

<b>TOTAL Modernization</b>
<b>71,910,000</b>

Back of the Bill

Federal Coronavirus State FiscalRecovery Fund  
REEMPLOYMENT ASSISTANCE SYSTEM MODERNIZATION

The nonrecurring sum of \$56,400,000 from the General Revenue Fund is appropriated to the Department of Economic Opportunity for the modernization of the Reemployment Assistance system that complies with section 282.206, Florida Statutes. **These funds shall be held in reserve. Release of these funds is contingent upon the full release of funds provided for system modernization in Specific Appropriation 2202A.** The department is authorized to submit quarterly budget amendments requesting release of these funds pursuant to the provisions of chapter 216, Florida Statutes, and based on the department's planned quarterly expenditures. Release is contingent upon the approval of a detailed operational work plan and monthly spend plan that identifies all work activities and costs budgeted for Fiscal Year 2021-2022.

