

Appendix G – Project Management Requirements

South Dakota Motor Vehicle SDCARS Replacement System RFP

Contents

1.	Introduction	2
1.1	<i>Working With the DOR and BIT Governance.....</i>	2
1.2	<i>Project Management Deliverables.....</i>	2
1.3	<i>Project Startup</i>	2
1.3.1	Project Kickoff	2
1.3.2	Project Startup Tasks	3
1.4	<i>Project Management Requirements</i>	4
1.4.1	Project Management Plan	4
1.4.2	Scope and Change Management	4
1.4.3	Schedule Management	4
1.4.4	Quality Management	5
1.4.5	Resource Management.....	5
1.4.6	Communications & Stakeholder Management.....	6
1.4.7	Risk & Issue Management	6
1.4.8	Status Reporting	6
1.5	<i>Document Repository.....</i>	7
1.6	<i>Project Management Tools.....</i>	7
1.7	<i>Frequency and Evolution of Project Management Activities</i>	8

1. Introduction

Project Management is ongoing for the duration of the contract. The primary objective of project management is to plan, manage, and control the timely and accurate completion and approval of all tasks and deliverables. The Offeror shall develop and execute the Project Management Plan and adhere to all scheduled due dates for all milestones.

1.1 Working With the DOR and BIT Governance

- The Offeror shall comply with and provide support to DOR and BIT project management processes and collaborate with all governance teams including the Steering Committee and Project Management Office (PMO).
- The State is open to any suggestions, improvements, and best practices which the Offeror can provide which will help to reduce risk, improve process and deliverable quality, and support the overall success of the project. Changes to processes, tools, guidelines, and associated repositories will be made, at the State's sole discretion, after consideration of any Offeror recommended changes. All changes will be submitted in writing and all approvals or rejections will be transmitted via written documentation.

1.2 Project Management Deliverables

The Offeror will provide the following deliverables which will follow the review and approval process.

- **Startup** – Project Kickoff Materials and Sessions
- **Methodology Review, Tailoring and Plan** – Documented as a Project Management Plan (should cover all the basic PMBOK areas – Schedule, Scope, Risk, Issue, Quality/Deliverable Review & Approval, Resources, Procurement, Communications & Stakeholders)
- **Requirements Management** – Initial Requirements Traceability Matrix (RTM) and Requirements Management Reporting and Approach
- **Initial 90 Day Schedule** – milestones, deliverables, state staff participation tasks
- **Rolling 90 Day schedule** – milestones, deliverables, state staff participation tasks
- **Offeror Project Organization Chart** – updated monthly
- **Establish Project Repository** – if not using the state's repository, state staff will be trained by Offeror staff and selected state staff will have full admin access to all areas of the Repository to see detailed data and have access to run reports, etc.
- **Communication Approach** – status reporting, demonstrations, staff updates, leadership updates

1.3 Project Startup

The Offeror is responsible for performing project startup activities as described below.

1.3.1 Project Kickoff

The Offeror and State shall plan and deliver multiple kickoff meetings as needed (and determined by the State Project Manager) to engage and coordinate with DOR project management staff and other stakeholders. For the kickoff meeting, the Offeror shall:

Appendix G – Project Management Requirements

South Dakota Motor Vehicle SDCARS Replacement System RFP

- Present an overview of the Project Management Plan and the manner in which project activities will be executed.
- Include an agenda, WBS, High Level Roadmap, presentation, and all other materials needed to detail the approach and preliminary activities for project implementation.
- Obtain approval 5 days in advance from the State for the meeting materials and agenda.
- Deliver kickoff presentation materials within 30 days of contract execution date.

1.3.2 Project Startup Tasks

The Master Project Schedule shall include fully detailed Contract and project start-up activities and activities for the first six months of the project per the Master Project Schedule requirements which shall include an overview of the timelines and phases/activities for the entire project. The following tasks shall be included in the Project Startup tasks within the Master Project Schedule and executed:

Offeror on-Boarding & Logistics

The Offeror shall at a minimum go through the State's on-boarding Process which includes:

- Undergo and satisfactorily pass necessary federal and State background check;
- Have their PCs checked for compliance to encryption and anti-virus standards by BIT;
- Receive identification badges;
- Sign non-disclosure forms, and other forms as required by the State and DOR.
- Participate, as necessary, in the documentation and tracking of any equipment used throughout the project according to State and/or BIT requirements.

Since the Offeror's staff will on-board and off-board at different times during the project, the Offeror shall designate a resource that will coordinate these on-boarding processes with the State. Offeror's Project Manager will review every 30 days or whenever a known change is made to ensure the appropriate people have the appropriate access to the State's equipment and data. All terminations will be reported to the State's PM immediately.

Proposed Delivery Methodology

The Offeror must use a proven project management delivery methodology. The Offeror must review and tailor the methodology with the State Project Manager to achieve agreed approach and timelines. The State will approve the proven methodology.

Contract Review

The Offeror and the State shall schedule meetings to review the awarded contract with the State team and Offeror team so that participants can be fully informed about the scope and approach for the project. This shall include this RFP and the Offeror's proposal which will be part of the contract. The Offeror shall schedule this review within 14 days after contract execution.

Initial Project Management Plan

The Offeror shall prepare and deliver an initial Project Management Plan and timeline for delivery of updates for the entire Project Management Plan. Details of the Project Management Plan requirements are identified in the sections that follows.

Appendix G – Project Management Requirements

South Dakota Motor Vehicle SDCARS Replacement System RFP

All Offeror project startup tasks or deliverables listed above are due within 60 days or sooner of contract execution date.

1.4 Project Management Requirements

The Offeror will complete all project management activities according to project standards which may be defined by the State over the course of the project. At the State's sole discretion any requirements may be waived.

- The Offeror shall develop, maintain, and follow a State approved Project Management Plan consistent with project and PMO standards that addresses all of the project management requirements in this RFP and the awarded contract.
- The Offeror shall periodically review the Project Management Plan for any updates that may need to be applied during the execution of the Contract.
- The Offeror shall document and share any assumptions made during the creation of the Project Management Plan, including any of the sub-plans.
- The Offeror shall collaborate with the State and its representatives to incorporate all best practices and approaches into the Project Management Plan and its sub-plans.
- The Offeror shall keep the Project Management Plan current to reflect best known information and lessons learned throughout the execution of the project to improve project execution.
- The Offeror shall develop a high-level roadmap to organize and depict the approach for managing and executing the project, including planned development/implementation milestones.

1.4.1 Project Management Plan

The Offeror shall work with the State's project management team to create a consolidated set of project management plans and deliverables and maintain them during the course of the Contract.

1.4.2 Scope and Change Management

The Offeror shall develop, present for approval, and execute a plan for defining and managing project scope including a Work Breakdown Structure (WBS) and approach for tracking progress toward completion.

- All documentation and work products, once the scope and schedule are agreed upon by the State Project Manager, shall be subject to the agreed-upon change management process.
- The Offeror shall update the WBS and Master Project Schedule that is approved by the State as part of the change management process.
- The WBS shall clearly define all project deliverables whether they are created by the Offeror, a Sub-contractor, or the State. All deliverables will be approved in writing by the State.

1.4.3 Schedule Management

The Offeror shall develop, present for approval, and execute a plan for creating, maintaining, and managing the Master Project Schedule.

Appendix G – Project Management Requirements

South Dakota Motor Vehicle SDCARS Replacement System RFP

- All project schedules shall include Offeror and State tasks. The Offeror shall obtain input and approval on State tasks before publishing. The Offeror may not commit State resources to timelines or tasks without State participation and approval of the schedule. The Offeror shall provide a calendar month's lead time (or other mutually agreed timeframe) to ensure that the appropriate State resources are available.
- The Offeror shall use a state defined system (e.g., Microsoft Project) to maintain all project schedules and be capable of preparing both detailed and summary schedules.
- The Offeror shall gain approval from the State before publishing modifications to the schedule baseline. If the completion date is affected, an amendment is required.
- Project schedules shall follow PMI PMBOK project management practices. Project schedules shall clearly define dependencies, resource requirements, the critical path of tasks, and no task shall be longer than 80 hours in duration. All project schedules shall include appropriate milestones approved by the State to allow for the overall tracking of project progress.
- All task durations and review cycles shall be calculated in State working days, not calendar duration of days.
- The Offeror shall at all times develop and propose project schedules that it believes are realistic and properly manage risk. Schedule delays which are not mutually agreed to as being caused by the State will not be considered for a change order nor additional compensation or consideration to the Offeror.

1.4.4 Quality Management

The Offeror shall develop, present for approval, and execute an approach for Quality Management. The Quality Management Plan must define the processes, oversight, and resources that will ensure that high quality deliverables are being developed, reviewed, and presented to the State in a consistent and managed approach.

- **Project Performance Improvement** – Over the course of the project and not less than at the end of each project phase the Offeror will fully participate in a review of lessons learned and project improvements that can be implemented.
- **Availability & Storage** – Documents, deliverables, and work products shall be stored in the agreed upon repository and shall be viewable by the State and its agents.

1.4.5 Resource Management

The Offeror shall develop, present for approval, and execute an approach for management of its resources on the project. The plan shall include:

- Project organizational structure
- Role and responsibility assignments including percent of time allocated to assignments
- Staffing plan describing when and how staff will be brought onto and transitioned off the project team, retention, and where they will be located
- Background checks
- Training needs

Appendix G – Project Management Requirements

South Dakota Motor Vehicle SDCARS Replacement System RFP

- Details on required support from the State staff, which will help the State to allocate the appropriate resources in alignment with the project plan

Substitution of Key Personnel during the Contract term shall be approved by the State as defined in the RFP.

1.4.6 Communications & Stakeholder Management

The Offeror shall develop, present for approval and execute an approach for communicating with stakeholders and project leadership. The Offeror shall work with the State to identify stakeholders, communication needs, communication activities and tools. The Offeror shall support and participate in presentations and information sessions with DOR leadership, staff, and partners as necessary to facilitate the project's success.

1.4.7 Risk & Issue Management

The Offeror shall develop, present for approval, and execute an approach for risk and issue management to ensure that potential risks are identified and addressed with both a preventative mitigation and a remediation plan. The Offeror shall develop and actively manage a risk register and issue register that shall be updated regularly as directed by the State

1.4.8 Status Reporting

Weekly Status Meetings

- The Offeror shall meet with the State team at least weekly or less frequently as determined by the State to report status. During these meetings the Offeror will conduct a project review (e.g., resources, schedule, issues, risks, procurement).
- The State will set the agenda and facilitate these meetings or may delegate these responsibilities to the Offeror.

Bi-Weekly Status Reports

The Offeror's Project Manager shall submit status reports to the State once every two weeks on a day mutually agreed upon by the State and Offeror. The proposed format and level of detail for the status reports will be subject to the State's approval. The report shall include, at a minimum, the following:

- Accomplishments over the reporting period
- Risk status for new or previously identified risks to any aspect of the project
- Issue status for new or previously identified issues to any aspect of the project
- Key activities over the next period
- Schedule for the next period's activities including deliverables and dates
- Deliverables expected to finish in the next period
- Deliverables expected to start in the next period
- Identification and justification of any proposed adjustments in the schedule (time), resources (staff), scope of work, costs, or other aspects of the Project Management Plan
- Identification of schedule delays and recommended corrective action plans
- Performance reporting, including variance analysis, trend analysis, and change requests

Appendix G – Project Management Requirements

South Dakota Motor Vehicle SDCARS Replacement System RFP

Monthly Executive Status Meetings

On a monthly basis, the Offeror shall meet with the DOR management team to report status.

- The Offeror shall provide an executive level project review (e.g., resources, schedule, issues, risks, procurement) highlighting items that require executive attention.
- The State will set the agenda and conduct these meetings or may delegate these responsibilities to the Offeror.
- One or more meetings may be necessary to update both DOR and other department leadership.

Quarterly Management Meetings

Every quarter or as otherwise mutually agreed, the Offeror shall present a project status to the State staff and managers to communicate the project status to the broader DOR community.

1.5 Document Repository

State's Project Artifact Repository

The Offeror shall implement and maintain a documentation repository. The DOR has chosen SharePoint as the primary document repository and will furnish licenses as necessary to the Offeror for this purpose. If SharePoint is used as the Document Repository, the State shall provide the hardware, operating system licenses, client access licenses, SharePoint software, and will be responsible for the backup and recovery of the site. The State shall maintain administrator rights to the SharePoint site. Changes to the SharePoint site shall be managed by the State through a change request process to be developed jointly between the Offeror and the State.

Alternate Repository

The State is open to the Offeror providing and implementing a supplementary Document Repository platform that facilitates traceability with other project artifacts. Traceability shall be managed by the features of the tools and platform rather than manually. The State will maintain overall administrator rights of the site, and changes to the site shall be processed through a change management process that the Offeror develops with input and approval by the State. The design of the repository shall be developed in collaboration with the State and the Offeror shall obtain approval of the design from the State. The Offeror shall provide staff that can implement the approved changes to the site.

The State has the option to review and approve any Offeror-proposed tool(s) to track requirements, test cases, defects and traceability.

1.6 Project Management Tools

The State prefers to use the following project management tools, unless justification is provided and agreed upon by the State as to how it would be beneficial to the State:

- SharePoint
- Microsoft Azure DevOps
- Microsoft Project & Microsoft Project Server
- Microsoft Office
- Microsoft Teams

Appendix G – Project Management Requirements

South Dakota Motor Vehicle SDCARS Replacement System RFP

- Adobe

If the Offeror employs a document repository other than SharePoint:

- The Offeror shall be responsible for performing backups of any repository the Offeror establishes.
- The Offeror shall be responsible for performing appropriate training to the Agency for any repository the Offeror establishes.
- The Offeror will provide the State with the highest level of access to its information on the site.

1.7 Frequency and Evolution of Project Management Activities

The State will work with the Offeror to determine the most practical and effective approach to project management which will evolve over time (collaboratively with the Offeror) to meet the needs of the project. The State expects that a project of this size and duration will evolve over time. The project management activities will be dynamic as well. The project management responsibilities described in this section represents a minimum set of required tasks and deliverables. The State will set the standards for project management reporting and tasks throughout the life of the project and they will be compatible with industry standards. The Offeror is responsible for complying with those project management standards.