**Key Activities**

- Complete Project Initiation Form (PIF)
- Create Project Tailoring Agreement (PTA)
- Update Project Schedule
- Determine Project Management Approach
- Develop Concept of Operations (Initiative-Level)
- Define Requirements
- Create Solution Architecture
- Develop Risk Management, Communications, IV&V, QA Approach
- Create/ Update Security and Privacy Artifacts
- Plan Decommissioning (if applicable)

**Initiation**

- Procure Resources - For Requirements or Entire Project
- Create WBS/High-Level Project Schedule
- Update/ Validate Business Case and Life Cycle Cost Estimate (from Information Provided for Budget)
- Develop Procurement Mgmt. Plan (if applicable)

**Planning**

- Procure Resources - For Design, Installation, Configuration, Development Activities and/or Solution (if applicable)
- Monitor and Control QA Activities
- Develop Solution Technical Design and Define Interfaces
- Execute Change Management Process
- Plan Implementation and Release Approach
- Create/ Update Security Artifacts

**Execution & Control**

- Determine Testing Strategy
- Create Data Conversion Strategy (if applicable)
- Configure Development, Testing, & Training Environments (if applicable)
- Configure/ Develop and Unit Test Software
- Conduct UAT
- Create Change Plan, User Training Content and Conduct Training (if applicable)
- Develop O&M Documentation (O&M/User Manual)

**Close Out**

- Handoff to Operations & Maintenance Support
- Close-out Project
- Conduct High Level Post-Deployment Review
- Prepare Project Completion Report
- Provide System Documentation to HUD IT Operations
- Complete Post-Decommission Report (if applicable)

**Control Gate Reviews**

- Project Initiation Form
- Project Charter
- WBS/Project Schedule (High-Level)
- Procurement Mgmt. Plan

**Operate & Maintain**

- Receive System Documentation from Project Team
- Provide Technical/ User Support (Tier 1 & 2: IT Operations; Tier 3: Program Offices)
- Conduct Annual Operational Assessment
- Continue Budgeting for O&M Costs
- Continue Update of Life Cycle Cost Estimate
- Monitor and Manage Solution Operational Performance and Metrics
- Perform Routine Maintenance

**Operational Readiness Review**

- Technical Design
- Interface Control Document
- Change Management Log
- Implementation Plan
- Test Plan/ Test Reports
- Data Conversion Plan

**Operational Readiness Review**

- Training Plan
- User Manual
- Operations & Maintenance Manual
- Security Artifacts (ATO Package)

**Key Points**

1. Submission of PIF notifies key OCIO and other stakeholders of commencement of project; official request to TRC for OCIO IPT resource assignments (Control Gate not needed since investment/ project funded through final appropriations; Control Gate needed if project unfunded).

2. O&M involves continuous assessment via segment portfolio reviews and annual operational assessments of need for modifications vs. decommission; both result in use of one of two PPM V2.0 project types.

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12/17/2013