Implementation Plan

PPM Version 2.0

<Project or Solution Name>

U.S. Department of Housing and Urban Development

<Month, Year>

Solution Information

	Information
Solution Name	*<Solution Name>*
Solution Acronym	*<Solution Acronym>*
Project Cost Accounting System (PCAS) Identifier	*<PCAS Identifier>*
Document Owner	*<Owner Name>*
Primary Segment Sponsor	*<Segment Sponsor Name>*
Version/Release Number	*<Version/Release Number>*

Document History

<Provide information on how the development and distribution of the Implementation Plan is controlled and tracked. Use the table below to provide the release number, date, author, and a brief description of the reason for creating the revised version.>

Release No.	Date	Author	Revision Description

Contents

1. Overview

1.1 Description of Implementation Effort

<Provide an overview of the deployment effort for the project. Include the solution/service characteristics, its software and architectural complexity, its geographic deployment, the number of planned releases, the number of operators required (if any), and the anticipated number of users. Provide the initial operability date.

Indicate if the system is a new, enhanced, integrated, or migrated version of an existing system. Be sure to include information about whether the introduction of the system will affect any existing databases or systems.>

1.2 Implementation Roles and Responsibilities

<Provide a list of activities required for deployment and the project staff (HUD or contractor) responsible for the activity and its completion. Use the table below to describe how different project roles contribute to the deployment effort for the project. Refer to the ITM Roles and Responsibilities document as necessary when identifying roles. Use positions or job titles rather than the names of individuals.

Use the following list of sample deployment activities as a starting point for populating the table:

- *Describe the procedures to be used for installation in the target environment*

- *Install and verify the software release in the target environment at a support site*

- *Prepare the executable software for each site, including any batch files, command files, data files, or other files needed to regenerate the executable software*

- *Verify that the installation plan is consistent with other project plans and represents a sound approach for installation*

- *Identify and record the exact version of software prepared for the support site*

- *Define and record the methods used to verify copies of the software*

- *Identify and record information needed to program and re-program any firmware devices in which the software will be installed>*

Role	Deployment Responsibilities

Table 1 - Implementation Roles and Responsibilities

1.3 Implementation Schedule

<Provide a summary schedule for the activities related to production deployment. Indicate which activities must be performed before the actual deployment commences, as well as the activities related to deployment itself.

If deployment will be done at multiple sites, provide a "model" schedule to show the details of a generic site deployment, and then indicate the start and completion date of each site to be installed in the overall schedule.

If the system is to be deployed incrementally in multiple builds or releases, provide a detailed schedule for each build or release.>

2. Implementation Planning

<Identify the key activities for deploying the system. Describe the effort involved for each type of activity, when each should be initiated, and any interdependencies within the project or with outside systems, applications, and data sources. Use the subsections below to describe typical deployment activities that should be considered.>

2.1 Coordination with Interfacing and Impacted Systems

<Describe any necessary coordination with owners of other systems, applications, or databases with which this system interfaces. Include situations such as those where the data interchange has been modified, where a new piece of support software has been upgraded or replaced, or where a supporting platform has been upgraded or replaced. Identify the testing to be performed with these other systems, including the use of live data and operational software, to verify proper operation prior to cutover.>

2.2 Hardware Requirements

<Provide a list of the equipment and hardware required to support the implementation. This may include computers, servers, peripheral equipment, simulators, emulators, diagnostic equipment, other non-computer equipment, and any network and data communication requirements. Include the specific models, versions, configuration settings, and the equipment owner. Also, include information about manufacturer support, licensing, usage and ownership rights, and maintenance agreement details.

If this information is available in another document or system, such as the Configuration Management Plan, reference that document.

Describe the methods for determining the number of expected users and for verifying that each user has the required minimum hardware/software configuration. If existing hardware or software is inadequate, document the method for obtaining the necessary upgrades.>

2.3 Software Requirements

<Provide a list of non-hardware components (e.g. software, databases, and compilers, operating systems, and utilities) required to support the implementation. Identify each component by specific name, code, or acronym, identification numbers, version numbers, release numbers, and applicable configuration settings. Also, include information about vendor support, licensing, usage, and ownership rights, as well as any required service and/or maintenance contract costs and associated payment responsibility. Identify whether the component is commercial off-the-shelf, custom developed or legacy. Identify any component used to facilitate the implementation process.

If this information is available in another document or system, such as the Configuration Management Plan, reference that document.>

2.4 Data Conversion

<Describe what data will be converted, where the data will come from, and how the supporting business processes will be organized, staffed, and scheduled. In the event that the data conversion is impaired or not completed due to unforeseen circumstances, document the backup or reversion strategy. Reference the Data Conversion Plan if the information is too detailed or complex to provide in this section.>

2.5 Documentation Preparation and Turnover

<Define who is responsible for assembling the package of documentation for delivery to the operations and support team, helpdesk, system administrators, and users. Reference the User Manual, Operations and Maintenance Manual, and other documents as appropriate.

Identify all documentation necessary to use and maintain the software and hardware, any warranty or maintenance agreements, commercial-off-the-shelf vendor materials, installation guides, training material, source and object code, and user guides.

Provide an up-to-date accounting of all reported problems, plus outstanding change requests and fixes. If responsibility for configuration management activities is to shift, provide the approach to transferring current and past versions of project artifacts.>

3. Personnel

3.1 Staffing Requirements

<Describe the number of personnel, length of time needed, types of skills, skill levels, expertise, and any necessary security clearances for the staff required during the implementation period. If specific staff members have been selected or proposed for the implementation, identify their roles and responsibilities.>

3.2 Implementation Staff Training

<Address any training necessary to prepare staff for implementing the system. Do not address user training, which is the subject of the Training Plan, unless the specific Project Type Guide allows you to do so.

Describe the type and amount of training required for each of the following areas, if appropriate, for the system:

- *System hardware/software installation*
- *System support*
- *System maintenance and modification*

List the courses that will be provided, a course sequence, and a proposed schedule. If appropriate, identify which courses particular types of staff should attend by job position description.

If one or more commercial vendors will provide training, identify them, the course name(s), and a description of the course content.

If project team members will provide the training, provide the course name(s) and an outline of the content of each course. Identify the resources, support materials, and proposed instructors required to teach the course(s).>

4.   Operational Readiness Review

<Provide a framework for conducting an operational readiness review (ORR) with the Technical Review Sub-Committee (TRC) by identifying the HUD attendees and their responsibilities, the timeframe for the meeting, and a checklist of activities to be completed in order for operations to commence. The ORR must be conducted in advance of any production operation, even if parallel operations are to be performed. If the deployment will occur at multiple sites or take place over a wide timeframe, consider scheduling a phased ORR and explain the timing of the first and subsequent ORRs.

Information systems software, hardware and equipment developed by or sold to Federal agencies must undergo security Certification and Accreditation (C&A) before the system is operational. This is a mandatory requirement. The process was recently revised and now culminates in the signing of the Approval to Operate (ATO) request by HUD's Chief Information Security Officer (CISO). The Security IPT member should help facilitate the C&A process. >

4.1 Cutover

<Describe the specific strategy and associated steps for going operational with the system. If there are multiple builds or releases, discuss the implications of repeating the cutover process.

Address any changes in the affected business processes as a result of cutover, and describe the method for discontinuing the original business process that is being replaced or altered.>

5. Release Approach

<The Release Approach is only necessary for a program or project that will be utilizing a phased or incremental approach for its development and/or implementation activities. The Release Approach content is unnecessary if there is only one release planned for all the requirements defined in the Requirements Definition Document (i.e., a phased implementation is not intended). Describe the strategy and activities addressed in the planning for the release. The Release Approach describes what portions of the system functionality will be developed and implemented in which releases and the rationale for each release and as such, is part of the Implementation Plan. This Implementation Plan provides the details regarding initial implementation of the releases, including sequencing and site-specific information.>

5.1 Rationale

<Describe the rationale for establishing this release approach. Reference any information or other deliverables (e.g. Requirements Definition document, Technical Design document, Project Management Plan, Communication Management Plan, Procurement Management Plan, Risk Management Plan, and Project Tailoring Agreement (PTA)) that may have influenced the development of the release approach. Include key considerations such as how the assumptions, constraints, and risks from the previous section impact the release approach. Also consider lessons learned from other deployments.>

5.2 Release Strategy

<Describe at a high level the overall strategy for segmenting the delivery of the solution into specific releases. Identify if the release strategy is for a phased function rollout/deployment or for a phased user base rollout/deployment.>

5.3 Release Content

<Identify each specific release, including a description of the functionality to be delivered in each release. Explain what the proposed system will do (and not do, if necessary). Map individual requirements from the Requirements Definition document to the specific release(s) that will provide that functionality, as appropriate. Provide any additional rationale for dividing the content into the specific releases.>

5.4 Release Schedule

<Provide a high level schedule for planned delivery of the releases and the significant milestones associated with transitioning each release through the PPM Life Cycle to production.>

5.5 Release Impacts

<Describe any business and/or system impacts associated with each release and the business processes that will be modified as a result of the deployment specified in this Release Plan. Identify any systems and interfaces that are directly impacted by the release strategy and any impacts to end users during the release cycle. Describe the relevant benefits, objectives, and goals to be met with each release.>

5.6 Release Notification

<If there is release-specific communication that needs to occur that is not already described in the Project Management Plan (Communication Management Plan), please describe here. Specify the individual stakeholders and/or groups requiring notification of an impending release. Also, describe the method for providing notification prior to and/or following successful release of the solution. Specify the information required by each person or group and the timeframes for receipt of the information, prior to release. For example, the helpdesk may require that a notification be received 10 days prior to release. Provide the release date, a user impact assessment, and a helpdesk impact assessment.>

5.7 Release Management

<Identify the activities used to manage the planning, organization, development, testing, and implementation of new features and functions, defects, change requests, etc. into the application being developed. Identify the individuals involved in a typical release process.

Develop a release checklist to help the project team identify when the product is ready for release for use by the customer.>

6. Implementation Impact

<Describe how the solution's implementation is expected to impact the network infrastructure, support staff, user community, etc. Include any references to service level agreements that describe the performance requirements, availability, security requirements, expected response times, system backups, expected transaction rates, initial storage requirements with expected growth rate, as well as helpdesk support requirements.

Describe any changes that are needed to existing service level agreements, or any new service level agreements that may be needed to operate and maintain the system. Explain how the service level agreement will be monitored and adjusted, if necessary.>

Appendix A: References

<Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.>

Table 2 below summarizes the documents referenced in this document.

Document Name	Description	Location
<Document name and version number>	<Document description>	**<URL to where document is located>**

Table 2 - Appendix A: References

Appendix B: Key Terms

Table 3 below provides definitions and explanations for terms and acronyms relevant to the content presented within this document.

Term	Definition
[Insert Term]	**<Provide definition of term and acronyms used in this document>**

Table 3 - Appendix B: Key Terms