



NMSIIS

**NEW MEXICO STATEWIDE IMMUNIZATION
INFORMATION SYSTEM**

HOSTING, MAINTENANCE AND SUPPORT

**PROJECT MANAGEMENT PLAN
(PMP)**

EXECUTIVE SPONSOR – MARK WILLIAMS

BUSINESS OWNER - DANIEL BURKE

PROJECT MANAGER – SHARON ZUIDEMA

ORIGINAL PLAN DATE: MAY 08, 2014

REVISION DATE: JANUARY 27, 2016

REVISION: 2.0

REVISION HISTORY	3
PREPARING THE PROJECT MANAGEMENT PLAN	4
ABOUT THIS DOCUMENT.....	4
PROJECT OVERSIGHT PROCESS MEMORANDUM – DOIT, JULY 2007	4
1.0 PROJECT OVERVIEW	4
1.1 EXECUTIVE SUMMARY- RATIONALE FOR THE PROJECT	4
1.2 FUNDING AND SOURCES	5
1.3 CONSTRAINTS	5
1.4 DEPENDENCIES.....	6
1.5 ASSUMPTIONS.....	6
1.6 INITIAL PROJECT RISKS IDENTIFIED.....	6
2.0 PROJECT AUTHORITY AND ORGANIZATIONAL STRUCTURE	7
2.1 STAKEHOLDERS	7
2.2 PROJECT GOVERNANCE STRUCTURE	8
2.2.1 Describe the organizational structure – Org Chart	8
2.2.2 Describe the role and members of the project steering committee	8
2.2.3 Organizational Boundaries, interfaces and responsibilities	9
2.3 EXECUTIVE REPORTING.....	9
3.0 SCOPE	10
3.1 PROJECT OBJECTIVES	10
3.1.1 Business Objectives	10
3.1.2 Technical Objectives.....	10
3.2 PROJECT EXCLUSIONS	10
3.3 CRITICAL SUCCESS FACTORS	10
4.0 PROJECT DELIVERABLES AND METHODOLOGY	11
4.1 PROJECT MANAGEMENT LIFE CYCLE	11
4.1.1 Project Management Deliverables	12
4.1.2 Deliverable Approval Authority Designations	Error! Bookmark not defined.
4.1.3 Deliverable Acceptance Procedure.....	13
4.2 PRODUCT LIFE CYCLE	13
4.2.1 Technical Strategy.....	14
4.2.2 Product and Product Development Deliverables.....	14
4.2.3 Deliverable Approval Authority Designations	15
4.2.4 Deliverable Acceptance Procedure.....	15
5.0 PROJECT WORK	15
5.1 WORK BREAKDOWN STRUCTURE (WBS)	15
5.2 SCHEDULE ALLOCATION -PROJECT TIMELINE	16
5.3 PROJECT BUDGET	17
5.4 PROJECT TEAM	17
5.4.1 Project Team Organizational Structure.....	17
5.4.2 Project Team Roles and Responsibilities	18
5.5 STAFF PLANNING AND RESOURCE ACQUISITION.....	18
5.5.1 Project Staff.....	18
5.5.2 Non-Personnel resources.....	19
5.6 PROJECT LOGISTICS	19

5.6.1 Project Team Training	19
6.0 PROJECT MANAGEMENT AND CONTROLS	20
6.1 RISK AND ISSUE MANAGEMENT.....	20
6.1.1 Risk Management Strategy.....	20
6.1.2 Project Risk Identification.....	20
6.1.3 Project Risk Mitigation Approach.....	20
6.1.4 Risk Reporting and Escalation Strategy.....	21
6.1.5 Project Risk Tracking Approach.....	21
6.1.6 ISSUE MANAGEMENT.....	21
6.2 INDEPENDENT VERIFICATION AND VALIDATION - Iv&V	22
6.3 SCOPE MANAGEMENT PLAN	22
6.3.1 Change Control.....	23
6.4 PROJECT BUDGET MANAGEMENT.....	23
6.4.1 Budget Tracking	23
6.5 COMMUNICATION PLAN	23
6.5.1 Communication Matrix	24
6.5.2 Status Meetings	24
6.5.3 Project Status Reports.....	24
6.6 PERFORMANCE MEASUREMENT (PROJECT METRICS)	24
6.6.1 Baselines.....	24
6.6.2 Metrics Library	25
6.7 QUALITY OBJECTIVES AND CONTROL	25
6.7.1 quality Standards	25
6.7.2 Project and Product Review AND ASSESSMENTS	26
6.7.3 Agency/Customer Satisfaction	26
6.7.4 PRODUCT DELIVERABLE ACCEPTANCE PROCESS.....	27
6.8 CONFIGURATION MANAGEMENT	27
6.8.1 Version Control.....	27
6.8.2 Project Repository (Project Library).....	28
6.9 PROCUREMENT MANAGEMENT PLAN	28
7. 0 PROJECT CLOSE.....	28
7.1 Administrative Close.....	28
7.2 Contract Close	29
ATTACHMENTS	29

REVISION HISTORY

REVISION NUMBER	DATE	COMMENT
1.0	May 08, 2014	Original Version Created
2.0	January 27, 2016	The RFP process was delayed and took more time than originally forecast
2.1		
2.2		

PREPARING THE PROJECT MANAGEMENT PLAN

The workbook for preparation of the Project Management Plan is built around helping the project manager and the project team to use the Project Management Plan in support of successful projects. Please refer to it while developing this PMP for your project.

ABOUT THIS DOCUMENT

Project Oversight Process Memorandum – DoIT, July 2007

“Project management plan” is a formal document approved by the executive sponsor and the Department and developed in the plan phase used to manage project execution, control, and project close.

The primary uses of the project plan are to document planning assumptions and decisions, facilitate communication among stakeholders, and documents approved scope, cost and schedule baselines.

A project plan includes at least other plans for issue escalation, change control, communications, deliverable review and acceptance, staff acquisition, and risk management.

“Project manager” means a qualified person from the lead agency responsible for all aspects of the project over the entire project management lifecycle (initiate, plan, execute, control, close). The project manager must be familiar with project scope and objectives, as well as effectively coordinate the activities of the team. In addition, the project manager is responsible for developing the project plan and project schedule with the project team to ensure timely completion of the project. The project manager interfaces with all areas affected by the project including end users, distributors, and vendors. The project manager ensures adherence to the best practices and standards of the Department.

Project product” means the final project deliverables as defined in the project plan meeting all agreed and approved acceptance criteria.

“Product development life cycle” is a series of sequential, non-overlapping phases comprised of iterative disciplines such as requirements, analysis and design, implementation, test and deployment implemented to build a product or develop a service.

1.0 PROJECT OVERVIEW

The Project Overview sets the stage for the details of the project and begins the “story” of the project and plan.

1.1 EXECUTIVE SUMMARY- RATIONALE FOR THE PROJECT

The vision of the New Mexico Department of Health (NMDOH) is a healthier New Mexico.

NMDOH is responsible for the promotion of health and wellness, improving health outcomes, and assuring safety net services for all people in New Mexico.

The mission of the Public Health Division within NMDOH is to work with individuals, families, and communities in New Mexico to achieve optimal health. We provide public health leadership by assessing health status of the population, developing health policy, sharing expertise with the community, assuring access to coordinated systems of care and delivering services to promote health and to prevent disease, injury, disability and premature death.

This project focuses on the mission of the New Mexico Immunization Program to protect New Mexico's children and adults from vaccine-preventable diseases. It is also the goal of NMDOH to reduce health disparities and address different racial/ethnic groups in a conscious effort to reduce health disparities.

Currently, the NMDOH operates a customized version of the Wisconsin Immunization Registry (WIR) system. New Mexico adopted the New York State version of the WIR system for its implementation of NMSIIS (2009). Significant modifications have been made to the NMSIIS since it was implemented. The NMSIIS application provides the ability for health and medical practices to enter immunization data and analyze and track immunization activity for individuals from birth to death throughout New Mexico. In addition, its data is used to evaluate the effectiveness of the statewide Immunization Program, determine the need for new programs, and identify underserved populations. In 2012, a major upgrade was implemented to enable automated electronic data exchange. New Mexico's current version of NMSIIS has functionality and maintenance issues. Envision Technology Partners was awarded the contract in May 2015 as a result of a competitive bid process.

Envision will be providing a license to WebIZ application services, hosting in Azure Government Cloud environment, support and on-going maintenance at the close of the project. They will incorporate the appropriate WebIZ modules and other modifications tailored to New Mexico's needs. Costs for on-going support and maintenance after go-live have been separated out from project costs.

1.2 FUNDING AND SOURCES

SOURCE	AMOUNT	ASSOCIATED RESTRICTIONS	APPROVERS
DOHIM1501	\$300,000	Expires Dec. 2015	DANIEL BURKE
DOHIM1601	\$300,763	Expires Dec 2016	

1.3 CONSTRAINTS

Constraints are factors that restrict the project by scope, resource, or schedule.

NUMBER	DESCRIPTION
1	Expiration of license for old system (June 1, 2016)

1.4 DEPENDENCIES

Types include the following and should be associated with each dependency listed.

- **Mandatory** dependencies are dependencies that are inherent to the work being done.
- **D- Discretionary** dependencies are dependencies defined by the project management team. This may also encompass particular approaches because a specific sequence of activities is preferred, but not mandatory in the project life cycle.
- **E-External** dependencies are dependencies that involve a relationship between project activities and non-project activities such as purchasing/procurement

NUMBER	DESCRIPTION	TYPE M,D,E
1	Vendor needs to complete build by May 1, 2016	M
2	Testing needs to be completed successfully for acceptance	M

1.5 ASSUMPTIONS

Assumptions are planning factors that, for planning purposes, will be considered true, real, or certain.

NUMBER	DESCRIPTION
1	Vendor will meet deadlines
2	Current system will continue to function successfully
3	New system will meet specifications

1.6 IMPLEMENTATION PROJECT PHASE RISKS IDENTIFIED

In this section identify and describe how each risk will be managed. Include the steps that will be taken to maximize activity that will result in minimizing probability and impact of each risk.

Risk 1: On-Line Training

Description – Due to financial constraints the contractor who was to create the on-line module is no longer employed.	Probability: Medium	Impact: High
	Mitigation Strategy: Locate alternative resource	
	Contingency Plan: Working with Melissa Walker for alternative resource	

2.0 PROJECT AUTHORITY AND ORGANIZATIONAL STRUCTURE

The Project Organization describes the roles and responsibilities of the project team. It also identifies the other organizational groups that are part of the project and graphically depicts the hierarchical configuration of those groups. It exists to clarify interaction with the project team.

2.1 STAKEHOLDERS

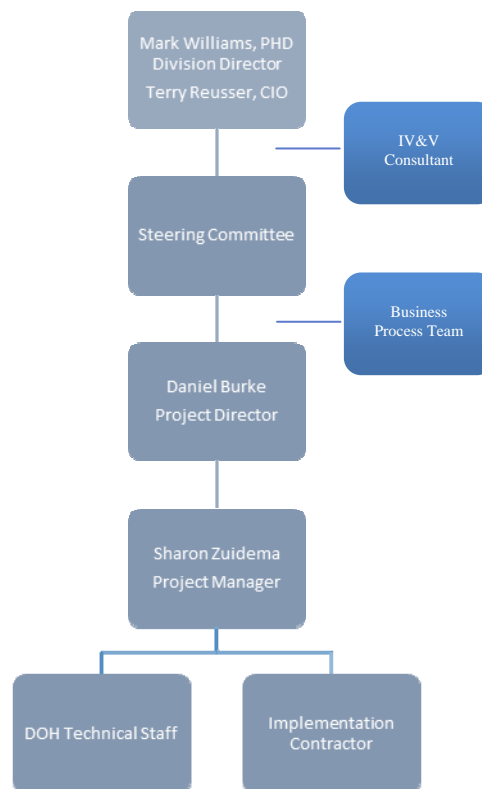
List all of the major stakeholders in this project, and state why they have a stake. Stakeholders are individuals and organizations that are actively involved in the project, or whose interests may be positively or negatively affected as a result of project execution or project completion. They may also exert influence over the project and its results.

NAME	STAKE IN PROJECT	ORGANIZATION	TITLE
DOH Immunization Program	Better functioning immunization registry. Improved inventory control leading to less wastage.	NMDOH	
Health Care Providers	Understand, adapt to and comply with new processes		
Health Care consumer	Better overall access of immunization information for the citizens of the State of New Mexico.		
Terry Reusser	Integration of applications which improves efficiency and reduces demand for support by automating the process.	ITSD, NMDOH	CIO
Dan Burke	Better functioning immunization registry to provide the state improved process for inventory thereby improving the accountability and efficiency of public dollars used.	PHD, NMDOH	PHD Director

NAME	STAKE IN PROJECT	ORGANIZATION	TITLE
Erica Martinez	The Immunization Registry will have improved functionality and reporting capabilities.	PHD, NMDOH	Immunization Program Manager

2.2 PROJECT GOVERNANCE STRUCTURE

2.2.1 DESCRIBE THE ORGANIZATIONAL STRUCTURE – ORG CHART



2.2.2 DESCRIBE THE ROLE AND MEMBERS OF THE PROJECT STEERING COMMITTEE

Members of the Steering committee members are Mark Williams, Daniel Burke, Erica Martinez, Terry Reusser, Paula Morgan, Sandeep Patel, Gene Lujan, Helene Minot and Sharon Zuidema.

The Steering Committee is chartered to provide governance over the direction and support of the project and is chaired by the Project Director. The Steering Committee member responsibilities include:

- Attend and participate in meetings
- Review and accept deliverables
- Review presented documentation
- Balance larger picture versus detail of project
- Review project funding and expenditures
- Champion the project
- Contribute to lessons learned

2.2.3 ORGANIZATIONAL BOUNDARIES, INTERFACES AND RESPONSIBILITIES

The NMSIIS Project Team which consists of Department of Information Technology and Immunization Department staff will work closely with the grantee, Envision Technology Partners in project management, subject expertise, conversion decision making and technical oversight.

2.3 EXECUTIVE REPORTING

Meeting agendas, minutes, and supporting documentation will be provided using the following software packages: Microsoft Word, Excel, PowerPoint, Outlook and Project. Every attempt will be made to publish the meeting minutes in a timely fashion and no later than 2 days prior to the next regularly scheduled meeting. Any meeting called should have an agenda, attempt to start and finish on time. The time allocated to each agenda topic will vary depending on the depth of issues to be covered. Items not able to be covered within the meeting time and accepted to be postponed may be added to the next standing meeting's agenda or may require a special meeting.

The meeting times and distributions of the meeting minutes for the project are as follows:

Project Team Meetings will be on a regular schedule. The scribe will be assigned by the Project Manager. The project team meetings will be posted in the electronic document libraries by the Project Manager.

Special Session Meetings may be called at the request of the Project Director or Project Manager. A range of issues may require a special meeting of a team, committee or subset. These meetings will be scheduled to accommodate the majority of attendees. The minutes from these meetings will be posted in the document library and e-mailed to all attendees.

Status reports will be used to track progress and issues. Project Team members will provide status reports as requested by the Project Manager. These reports will be in addition to such reports prepared upon request and by other contractors. Monthly DoIT status reports will be submitted by the Project Manager.

Issues and risk management and resolution help to resolve those issues or risks not anticipated during planning process. Issues or risks should be reported at the earliest possible time so that corrective action and risk mitigation can be developed to address with the issue or risk. The corrective action should address both the immediate need and the underlying cause of the issue or risk. The Project Manager will keep an issue and risk tracking log and will work with the Project Team for corrective action.

The Project Manager will maintain an action item list. This action item list identifies the action item, the reference item, the responsible party, solution, and the due and completion dates. Updates may also be reflected in meeting minutes.

3.0 SCOPE

3.1 PROJECT OBJECTIVES

3.1.1 BUSINESS OBJECTIVES

NUMBER	DESCRIPTION
Business Objective 1	Improved health outcomes for the people of New Mexico
Business Objective 2	Improved quality, accessibility and utilization of health care services
Business Objective 3	Improved fiscal accountability
Business Objective 4	Technology supports timely, data-driven decisions; improved business operations; and improved public information and education

3.1.2 TECHNICAL OBJECTIVES

NUMBER	DESCRIPTION
Technical Objective 1	An improved and integrated NMSIIS application will provide better information to all stakeholders with regard to the health of the citizens of New Mexico.
Technical Objective 2	Implement a more recently developed IIS with improved functionality, lower support and maintenance costs and reduced time devoted to maintenance and support issues.
Technical Objective 3	Develop and provide technical training for the provider community.
Technical Objective 4	Complete Requirements and Configuration documentation and Time Line for NMSIIS application.
Technical Objective 5	Implement NMSIIS in test environment.
Technical Objective 6	Develop test plan and scripts for NMSIIS. Execute test scripts in test environment. Track and fix defects.
Technical Objective 7	Implement NMSIIS in production.
Technical Objective 8	Ensure secure integration not only for storing and exchanging information but also for coordinating the full life-cycle of provider support of the health care recipient and vendor(s).

3.2 PROJECT EXCLUSIONS

3.3 CRITICAL SUCCESS FACTORS

Identify the critical success factors for achieving success in this project. Metrics are key to understanding the ability of the project to meet the end goals of the Executive Sponsor and the Business Owner, as well

as the ability of the project team to stay within schedule and budget. See also section 6.7 Quality Objectives and Controls.

NUMBER	DESCRIPTION
QUALITY METRICS 1	Strict adherence to the RFP process to ensure NMDOH selects the most advantageous software solution.
QUALITY METRICS 2	Independent verification and validation review will be conducted on all project deliverables.
QUALITY METRICS 3	Requirements captured, documented and tracked throughout the project are met.

4.0 PROJECT DELIVERABLES AND METHODOLOGY

4.1 PROJECT MANAGEMENT LIFE CYCLE

Phase	Summary of Phase	Key Deliverables
INITIATION		<ul style="list-style-type: none"> • Prepare and present project certification documentation – initiation phase • Initiate project structure • Develop planning groups for all sub projects and initiate planning activities
PLANNING		<ul style="list-style-type: none"> • Prepare and present Project Management Plan for certification • Prepare high-level schedule • Finalize project structure • Negotiate and execute IV&V contract • Procure necessary contract resources and systems.
IMPLEMENTATION		<ul style="list-style-type: none"> • Prepare and present updated Project Management Plan – implementation phase • Technical Architecture approved

		<ul style="list-style-type: none"> • Manage implementation vendor contracting preparation • Execute implementation vendor contract amendment • Implementation of upgrade • Vendor contract administration • IV&V Reports Submitted
CLOSEOUT		<ul style="list-style-type: none"> • Prepare and present project certification documentation – closeout phase • Lessons learned • Closeout activities • Final IV & V Report • Project Closeout Presentation

4.1.1 PROJECT MANAGEMENT DELIVERABLES

Project Deliverables are work products or artifacts that are driven by the project management methodology requirements and standard project management practices regardless of the product requirements of the project.

4.1.1.1 Project Charter

Description – The initial project deliverable plan will contain the Project Charter. This deliverable may be revised during planning phase.	Deliverable Acceptance Criteria – Sign-off by Project Sponsor or Project Director
	Standards for Content and Format – Use of DoIT Project Charter template
	Quality Review -. Peer review for grammar and spelling Key project team members review for consensus

4.1.1.2 Project Management Plan

Description – The Project Management Plan will be the guide used throughout the Project. This plan will contain the following plans: Scope Management,	Deliverable Acceptance Criteria – Approval by Project Team and Steering Committee Sign-off by Project Sponsor or Project Director
	Standards for Content and Format – Use of DoIT Project Management Plan template

Schedule Management, Budget, Risk Management, Communications, Change Management, Lessons Learned and Roles/Responsibilities of team members. This plan is an evolving document as new information will be added and existing information will be revised during initiation and planning phase.	Quality Review – Peer review for grammar and spelling Key project team members review for consensus Final review by Steering Committee, Project Director and Sponsor
--	--

4.1.2 DELIVERABLE APPROVAL AUTHORITY DESIGNATIONS

Complete the following table to identify the deliverables this project is to produce, and to name the person or persons who have authority to approve each deliverable.

DELIVERABLE NUMBER	DELIVERABLE	APPROVERS (WHO CAN APPROVE)	DATE APPROVED
PRJ-DEL-001	Project Charter	Jane Peacock Daniel Burke	
PRJ-DEL-002	Project Management Plan (PMP)	Jane Peacock Daniel Burke	

4.1.3 DELIVERABLE ACCEPTANCE PROCEDURE

Describe the process that this project will use for the formal acceptance of all deliverables.

The Project Director and the Project Sponsor(s) will review and accept the project documents

4.2 PRODUCT LIFE CYCLE

“During the project management lifecycle, agencies shall select and implement a phase product development lifecycle methodology approved by the Department.” PROJECT OVERSIGHT PROCESS Memorandum

Phase	Summary of Phase	Key Deliverables
Initiation and Planning	Project scope of work and deliverables identified Definition of system requirements, work breakdown schedule	Project Charter Project Management Contract
Design and Implementation	Implementation and	IV&V Contract

	configuration of project software, hardware, databases, and customizations including reports	Software and Implementation Contract Software Licenses Data Conversion Services Software Implementation Services
Testing and Training Plan	User acceptance testing (UAT)	UAT Test Plans Delivery Sign Off Documents Training Documentation
Training and Deployment	Transition to operations in production environment	Production Cutover Plan End user training System Documentation Conduct Training
Maintenance	Maintenance of new systems; project closeout and lessons learned	Maintenance and support plan Annual maintenance agreements with vendors

4.2.1 TECHNICAL STRATEGY

Discuss the key technical strategies for achieving success in this project.

- Ensure the product is sustainable by NMDOH IT Bureau
- Ensure the product's usability by the stakeholders
- Ensure the product meets current and future immunization registry requests. NM

4.2.2 PRODUCT AND PRODUCT DEVELOPMENT DELIVERABLES

Product Deliverables are work products or artifacts that are driven by the product management methodology requirements and standard project management practices regardless of the product requirements of the project.

4.2.2.1 NMSIIS Implementation

Description:	Deliverable Acceptance Criteria -
	Standards for Content and Format -

	Quality Review -
--	------------------

4.2.3 Deliverable Approval Authority Designations

Complete the following table to identify the deliverables this project is to produce, and to name the person or persons who have authority to approve each deliverable.

DELIVERABLE NUMBER	DELIVERABLE	APPROVERS (WHO CAN APPROVE)	DATE APPROVED
4.2.2.1	Implementation	TBD	

4.2.4 DELIVERABLE ACCEPTANCE PROCEDURE

Describe the process that this project will use for the formal acceptance of all deliverables.

As part of the Deliverable Acceptance Procedure, the Project Team will review each of the deliverables. During the Project Team review period, any issues identified will be documented in the issue log and resolved if possible prior to the next step. After a deliverable is reviewed, a recommendation from the Project Team for acceptance will be created. A procedure for final sign-off will be created at time of contract award.

5.0 PROJECT WORK

5.1 WORK BREAKDOWN STRUCTURE (WBS)

A WBS is a deliverable-oriented grouping of project elements that organizes and defines the total work scope of the project. Describe the work activities that comprise the work breakdown structure (WBS) or the work packages within the WBS. Identify the WBS element or other work package identifier and provide a general description of the tasks or activities, the definition or objectives, and the milestones and deliverables of each work package.

Use the chart below for highest level presentation, and provide a more detailed WBS as an attachment to this project plan.

Identifier	Work Package Description	Definition/Objective	Milestone/Deliverable
1.0	Initiation Phase	This phase defines overall parameters of the project and established the appropriate project management and quality environment required to complete the project	Project Charter, Initial Risk Assessment, High-level schedule, Approval for next phase.
2.0	Planning Phase	This phase identifies the implementation approach, procurement method and establishes all necessary documentation.	Contract Amendment Negotiated and Executed, IV&V Contract Negotiated, Finalize PMP, Committ Resources. Approval for next phase.
3.0	Implementation Phase	This phase deploys the upgraded system to a prepared set of users and positions on-going support and maintenance.	Confirm Schedule, IV&V Contract Executed Configuration, Testing, Training, and Deployment.
4.0	Closeout Phase	This phase closes out the project and completes the Transition to Production.	Closeout report, Transition to Production document, Lessons Learned

5.2 SCHEDULE ALLOCATION -PROJECT TIMELINE

The project timeline is a high-level view of project activities with a focus on project milestones. The project timeline does not replace the need for a detailed project schedule and it is to highlight key events such as deliverable due dates and when go/no-go decisions are made.

The table below should provide a high level view of the project time line, or a summary-level Gantt chart can be used to meet the timeline requirement.

Please provide a more detailed project schedule as an attachment to this plan

Identifier	Task/Activity Name	Resource Name	Milestone (Y/N)	Effort/ Duration	Start	Finish	Dependent Task
1.0	Initiation Phase	Project Director Project Team	Y	3 months	5/2015	8/2015	RFP Awarded
2.0	Planning Phase	Project Director Project Team	Y	4 months	08/2015	12/2015	RFP Award and Execute Vendor Contract
3.0	Implementation Phase	Project Director Project Team Vendor Resources	Y	5 months	1/2016	5/2016	Completion of Planning Phase

4.0	Closeout Phase	Project Director Project Team Vendor Resources	Y	1 months	6/2016	6/2016	Completion of Implementation Phase

5.3 PROJECT BUDGET

Costs estimates are the costs applied to an activity in a project by assigning resources with associated rates or fees. Resources can include equipment, material, technology, processing cycles, or people. The total cost is critical and should be consistent with the proposal; include breakdowns as needed. Match these cost estimates with the actual billed amounts. Use an appropriate format for the project size and customer requirements (e.g., by WBS, milestone, or deliverable).

Envision Services:

Mthly Support Services	\$ 58,987
Development	\$ 17,600
User Acceptance Testing	\$ 16,000
Training the Trainer/materials	\$ 16,000
Licensing/Cloud Setup	\$148,138
Retainage	\$ 30,400
 Total Envision Remaining Costs	 \$287,125
Total Consulting Costs (IV&V, TekSystems)	\$130,160
Estimate to Complete	\$417,285
Paid to Date	\$183,478
Remaining Balance Plan Phase	\$166,522
 TOTAL Implementation Request:	 \$300,763
Est. Total Project Cost	\$600,763

5.4 PROJECT TEAM

5.4.1 PROJECT TEAM ORGANIZATIONAL STRUCTURE

Insert a graphical Organization Chart here. The Organizational Structure (OS) is a hierarchical configuration defining levels of program management and may identify all project personnel. The OS should be simple and straightforward. Include role names and people's names. Consider identifying the core project team by shading their respective boxes on the chart. On complex projects, consider using a second OS to identify core project team. The OS can also be used for management reporting.

5.4.2 PROJECT TEAM ROLES AND RESPONSIBILITIES

List the team members, their role, responsibility and functional manager. Make sure to include a comprehensive listing including those from the organization managing the project, business members involved to ensure business objectives are met and the vendor members that may have a specific role.

		Sharon Zuidema	Alan Tway	Darren Pettis	Sarah Lucero	Jerry Quintana	Fran Johnson	Erica Martinez	Felicia Martinez	Liz Cisneros	Envision	Test Team	Training Team	Internal Support
Project	Project Management Plan	R								R				
Planning & Design	Business Requirements Document	A	C	C	C	C	A	C	C					
Planning & Design	Detailed Design Documents - Application	A	C		C	C	A	C	C	R				
Planning & Design	System Design Document	A	C	C	C	C	A	C	C	R				
Planning & Design	Systems Requirements Specification	R	C	C	C	C	I	I	I	R/I				
Planning & Design	Azure Environment Infrastructure	A		C			A			R				
Planning & Design	Rhapsody/HL7	A		R		C				C				
Conversion	Test Plan/Strategy	A	R	C	C	C	A	C	C	R	I			
Conversion	Test Cases	A	R	C	C	C	R	A	C	C	R	I		
Conversion	Testing environment preparation	I		R				I			R			
Conversion	Conduct test environment UAT	A					A				R			
Conversion	Create conversion queries, reports	A			R	R		I	C	C	I			
Conversion	Create HL7 test plan	A		R			C	I			I			
Conversion	Vital Records Verification of new feed													
Conversion	Review Test Results, identify issues	R	C	C	C	C	C	R	C	C	I			
Implementation	Communicate with Users	I						R	C	C	I			
Implementation	Systems Deployment Plan	R/A	C					A			R			
Implementation	Conduct go-live UAT													
Implementation	Test Results (Envision/DOH)	I/A	C	C	C	C	C	I/A	C	C	R/I	R		
Implementation	Training Documentation - 'Train the Trainer'	I						A	C	C	R			
Implementation	Train the Trainer							A	C	C	R			
Implementation	Train the Users	I/A	C					A	C	C			R	
Implementation	Archive Old System	A	C	C	R	R	C	I						
Implementation	Environment	A	C	C	C			A			R			
Support	Internal Support Procedures	A		R				A	R	R	I		C	
Support	On-going Support/Maintenance			S	S		S	S	S	S	R			
Support	Create new Reports				R									
Support	Run reports							R	R	R			S	

5.5 STAFF PLANNING AND RESOURCE ACQUISITION

Complete the chart below identifying the project team members and details concerning their project commitment. Project staff should include State, Contract, Customer (Business Owner), or Vendor team members

5.5.1 PROJECT STAFF

Resource	Cost Estimate	Estimated Hours	Availability	Skill Set	Work Product/Deliverable
----------	---------------	-----------------	--------------	-----------	--------------------------

Erica Martinez				Management	Project Direction
Sharon Zuidema				Project Management	Project Management Deliverables
PHD Staff					Project Tasks; training
ITSD Staff					Software implementation project tasks
IV&V – Helene Minot				PMP/IV&V	IV&V Deliverables

5.5.2 NON-PERSONNEL RESOURCES

Use this section to list services or product (HW/SW and such) needed for project

Resource	Cost Estimate	Estimated units/hours	Availability	Source	Work Product/Deliverable
TBD					

5.6 PROJECT LOGISTICS

Logistics describes how the project manager, project team, the business owner/customer and any vendor resources will physically work together. Include anything to do with moving or starting resources. Training specifically related to project team members should be included here.

5.6.1 PROJECT TEAM TRAINING

Describe training if any needed by project team members. This is not to include training for end users, system administrators or business owners; those should be handled within a training document or part of the transition to operations planning.

TBD (Dependent on RFP Award)

Resource	Cost Estimate	Estimated Hours	Availability	Skill Set	Work Product/Deliverable

6.0 PROJECT MANAGEMENT AND CONTROLS

6.1 RISK AND ISSUE MANAGEMENT

PMBOK®:

Risk: “An uncertain event or condition that, if it occurs, has a positive or negative effect on a project’s objectives.”

Issue: “A point or matter in question or dispute, or a point or matter that is not settled and is under discussion or over which there are opposing views or disagreements.”

Both Risks and Issues can significant impact a project’s success, and both should be handled in similar ways.

6.1.1 RISK MANAGEMENT STRATEGY

Provide a detailed explanation on the strategy for how risks are identified, analyzed/ quantified, mitigated, reported, escalated and tracked. Include the use of tools such as project management software, forms, and templates. A separate risk management plan may also be developed if needed for the project and included as an Appendix to this document. If that is the case, a high level summary of this plan needs to be included here with the specific reference.

The Project management plan will be entered into Microsoft Project and monitored weekly for issues/risks. The following table will be used to rate the issue/risk. The weekly project report will include the risk identification schema as shown below.

6.1.2 PROJECT RISK IDENTIFICATION

Risk Description		Impact Levels:					6.1.3 Project Risk Mitigation
		Very High	High	Medium	Low	Very Low	
Probability Levels:		1	2	3	4	5	
	Certain	1					
	Expected	2					
	Likely	3					
	Possible	4					
	Unlikely	5					

Approach

We will follow the Risk Management Process below as suggested by DoIT:

Risk Management Process

Risk Processes	Risk Planning	Risk Identification	Risk Qualification	Risk Quantification	Risk Response	Risk Monitoring & Control
Definition	Deciding how to approach and plan risk management activities	Determining which risk might affect the project	Analysis of risks and conditions to prioritize their effects	Measuring the probability and consequences of risks and estimating their implications	Developing procedures and techniques to enhance opportunities and reduce threats	Monitoring residual risks, identifying new risks, executing risk reduction plans, and evaluating their effectiveness
Inputs	Organization Policies Risk Tolerances WBS	Risk Management Plan Risk categories Historical information Business Case Risk Assessment Project Estimation	Risk Management Plan Identified Risks Assumptions Scales of probability and impact	Risk Management Plan Identified Risk List of prioritized risks Expert judgment	Risk Management Plan List of prioritized risk Risk rankings Probabilistic analysis Probability of achieving cost and time objectives	Risk Management Plan Risk Response Plan Project Communication Progress Reviews Scope changes
Tools & Techniques	Planning Meetings	Document reviews Assumption analysis Checklist	Precision ranking Probability / impact risk rating matrix	Interviewing	Avoidance Mitigation Acceptance Transference	Risk Response Audits Risk Review Meeting
Outputs	Risk Management Plan	Identified Risks Triggers	Overall risk ranking List of prioritized risks – high, medium, low	Prioritized list of quantified risk Probabilistic analysis Probability of achieving the cost and time objectives	Risk Response Plan – mitigation and contingency	Workaround Plans Corrective action Change Request Updated Project Log Updated Risk Form

6.1.4 RISK REPORTING AND ESCALATION STRATEGY

The regularly scheduled project report will include issue/risk identification for each item.

6.1.5 PROJECT RISK TRACKING APPROACH

Number		Risk	Probability	Impact	Rating	Contingency Plan	Mitigation Plan
1		Example	Certain	High	0.7125		

6.1.6 ISSUE MANAGEMENT

From August 2015 through January 2016, a excel spreadsheet was used to map issues. Starting in February, issues are logged through the vendor's Help Desk solution.

6.1.6.1 Internal Issue Escalation and Resolution Process

This internal process is provided for issues that involve project resources, processes, procedures, or methodology that should be resolved within the Division that is responsible for managing the project without affecting the overall project schedule, cost, or quality. This process should be used for improving project processes as the project is executed and where the implementation of such improvements should not be postponed to Lessons Learned during Project Close.

6.1.6.2 External Issue Escalation and Resolution Process

The external process is provided for issues that involve project resources, processes, procedures, or methodology that cannot be resolved within the Division that is responsible for managing the project without affecting the overall project schedule, cost, or quality.

6.2 INDEPENDENT VERIFICATION AND VALIDATION - IV&V

Independent Verification and Validation (IV&V) means the process of evaluating a system to determine compliance with specified requirements and the process of determining whether the products of a given development phase fulfill the requirements established during the previous stage, both of which are performed by an organization independent of the development organization. Describe the process that will be employed to meet IV&V requirements.

Independent Verification and Validation (IV&V) is a risk mitigation strategy designed to provide management with project oversight through an independent evaluation a project's product and process quality. The project has adopted a low risk implementation strategy by upgrading an existing application with a well-established and tested version. The IV&V plan will be tailored to address the unique risks associated with the upgrade.

The IV&V plan will:

1. Evaluate and validate that products and deliverables of a given development phase fulfill the requirements and performance outcomes set forth in the scope and project plan.
2. Provide a "close-out" report to the Steering Committee at the end of project

Specific deliverables from the IV&V contract:

- IV&V Project Management Plan.
- Initial Review and Risk Assessment.
- Periodic Review
- Close-out Report

6.3 SCOPE MANAGEMENT PLAN

Describe the process that is going to be used to manage the scope of the project. Make sure to address managing stakeholder expectations.

Most changes to scope are requests that add, change, or delete project objectives or deliverables. Changes in scope, if at all possible, will be avoided and any new objectives and/or deliverables deferred to a follow-on project. Any proposed changes in scope will be analyzed for impacts on the project including schedule, budget and quality. The findings will be presented to the Steering Committee for approval or rejection.

6.3.1 CHANGE CONTROL

6.3.1.1 Change Control Process

Change Control establishes how change will be managed, including capturing, tracking, communicating, and resolving change. Due to much ambiguity regarding change, it is vital that we document and discuss the change process with the executive sponsor.

Project changes will follow a decision making process. These changes include modifications to scope, schedule, budget, and quality. Significant changes of these planning components will be reviewed and approved or disapproved by the Steering Committee. If a modification or enhancement to the project has been identified, a change request form will be completed. The Steering Committee will review the request to determine impacts to scope, schedule, budget, quality and resources. The Steering Committee will recommend accepting the change, rejecting the change, or may request additional information. The request will be documented by the Project Manager and if the change is approved, appropriate changes will be made to the Project Management Plan and other project documentation.

6.3.1.2 Change Control Board (CCB)

Insert a graphic or textual description identifying the Change Control Board (or function) for this project. The CCB may be an individual or group of individuals authorized to approve changes to the project plan.

During the course of the NMSIIS Hosting, Support, and Maintenance Project, the Steering Committee will fill the role of the Change Control Board.

6.4 PROJECT BUDGET MANAGEMENT

Costs estimates are the costs applied to an activity in a project by assigning resources with associated rates or fees. Resources can include equipment, material, technology, processing cycles, or people. The total cost is critical and should be consistent with the proposal; include breakdowns as needed. Match these cost estimates with the actual billed amounts. Use an appropriate format for the project size and customer requirements (e.g., by WBS, milestone, or deliverable).

6.4.1 BUDGET TRACKING

Costs estimates are the costs applied to an activity in a project by assigning resources with associated rates or fees. Resources may include equipment, material, technology, processing cycles, or people. The total cost is critical and should be consistent with the proposal and include breakouts per category as needed. The Project Manager will verify these cost estimates and proposed amounts with the actual billed amounts.

6.5 COMMUNICATION PLAN

Communication planning involves determining the information and communication needs of the stakeholders, executive sponsors, project team and others as needed. The communication plan needs to address who needs what information, when they will need it, how it will be given to them, and by whom. The complexity of the project may require a separate communication plan; however a high level summary of that plan will need to be included here and a reference made to the appropriate Appendix.

6.5.1 COMMUNICATION MATRIX

	Meetings	Status Reports	Other Communications
To Executive Sponsor	Monthly	Monthly	As Needed
To Steering Committee	Monthly	Monthly	As Needed
To Project Director	Bi-Weekly	Bi-Weekly	As Needed
To Project Team	Bi-Weekly	Receive From Members	As Needed
To Stakeholders	As Requested	As Requested	As Needed

6.5.2 Status Meetings

Status Meetings with the core project team will be held on a regular basis. This will include the project manager, project director and vendor project manager. Project Status will be the first agenda item. If needed, special meetings will be called to discuss and address issues.

6.5.3 PROJECT STATUS REPORTS

Project Status Reports which include reports from the Vendor will be distributed to the Project Sponsor and the Project Director and will be presented at each Steering Committee Meeting. These status reports will be rolled up into the Steering Committee status report and reviewed at each meeting.

The monthly DoIT Status Report will be completed by the Project Manager and submitted per the DoIT process.

6.6 PERFORMANCE MEASUREMENT (PROJECT METRICS)

The Project Manager and Executive Sponsor define the project metrics that will be used to control the project. Each project will need to have an established metrics program. Metrics are collected for measuring the progress of a project against its planned budget, schedule, resource usage, and error rates, and of establishing a historical database, which will aid in planning and forecasting future projects. At a minimum metrics must be established for time (schedule), cost (budget) and quality.

6.6.1 BASELINES

Project Area	Category	Measure
TBD		

--	--	--

6.6.2 Metrics Library

The reviewed metrics in various software programs will be versioned by date and saved to the Project Library.

6.7 QUALITY OBJECTIVES AND CONTROL

Quality Management includes the processes required to ensure that the project will satisfy the needs for which it was undertaken. It includes all activities of the overall management function that determine the quality policy, objectives, quality assurance, quality control, and quality improvement, within the quality system. If a separate Quality Plan is used, include a high level summary in this document and refer to the appropriate appendix.

6.7.1 QUALITY STANDARDS

Describe the agency, industry or regulatory project performance standards that will be followed and assessed by the project. These quality standards will be used to assess whether the quality objectives were achieved.

Identify each of the project quality standards that are directly related to the project and not to the performance of the actual product and/or service. For each quality standard, identify the tracking tool or measure such as number of project reviews or Project Status.

No.	Quality Standard	Tracking Tool or Measure
1	Project management plan approved and followed	<ul style="list-style-type: none"> • PMP signed off by Steering Committee • Project status reports
2	Certification to proceed to next phase by DoIT	<ul style="list-style-type: none"> • Approval from DoIT Project Certification Committee and release of funds
3	Project risks documented, mitigated and tracked	<ul style="list-style-type: none"> • Risk Management Log
4	Project issues documented, tracked, and worked to resolution	<ul style="list-style-type: none"> • Issue Log
5	Project is within budget	<ul style="list-style-type: none"> • Project status • Budget management

	Independent Verification and Validation	<ul style="list-style-type: none"> • Periodic reviews • Respond to identified issues and risks
	Project completed based on the original project scope and approved scope changes	<ul style="list-style-type: none"> • Project Management Plan • Change Control Process • Scope Management • Steering Committee Meeting Decisions

6.7.2 PROJECT AND PRODUCT REVIEW AND ASSESSMENTS

Review Type	Quality Standard	Tools	Reviewer	Reports
Requirements				
Plans				
Milestones				
Testing				

6.7.3 AGENCY/CUSTOMER SATISFACTION

The project manager should assess the on-going sense of the customer agency about how they feel the project is going, and how team members are acting on the project. This feedback would be helpful to the success of the project and the professional growth of the project team members.

Examples:

Areas of feedback	When	How Often
Agency awareness	Feedback from the NMDOH PHD employees and end-users	Monthly
Quality of communications	Feedback during the various meetings	At Project Team meetings and Steering Committee meetings; other meetings when held
Manages project tasks	Feedback from Project Sponsor, Steering Committee, Project Director	Monthly
Productive Meetings	Feedback from Project Sponsor, Steering Committee, Project Director, Project Team, Testers, Training Attendees, Deployment Users	Monthly and per phase of the project

6.7.4 PRODUCT DELIVERABLE ACCEPTANCE PROCESS

How the client takes procession of the product. Delivery of media; manuals; contracts; licenses; services agreements; configuration settings; status of patches to COTS products; in-house or vendor developed code; test cases, routines, and scripts; and other items required to operate the product.

Deliverable	Final Approval Process	Customer Acceptance Criteria
Azure Government Cloud Set-up	Review and approval by Erica Martinez and Sharon Zuidema	Meets contract requirements
3 year license for WebIZ	Review and approval by Erica Martinez and Sharon Zuidema	Meets contract requirements
Azure Government Cloud Hosting	Review and approval by Erica Martinez and Sharon Zuidema	Meets contract requirements
Development/Implementation	Review and approval by Erica Martinez and Sharon Zuidema	Meets contract requirements
User Acceptance Testing document (use cases)	Review and approval by Erica Martinez and Sharon Zuidema	Meets contract requirements
WebIZ Training & Materials	Review and approval by Erica Martinez and Sharon Zuidema	Meets contract requirements
Production Release/Go-live	Review and approval by Erica Martinez and Sharon Zuidema	Meets contract requirements
Technical Support	Review and approval by Erica Martinez and Sharon Zuidema	Meets contract requirements

6.8 CONFIGURATION MANAGEMENT

Configuration Management determines how project information (files, reports, designs, memos, documents, etc.) will be managed (tracked, approved, stored, secured, accessed, version control, etc.) and owned by (e.g., Agency managing the project or the Customer). Standards and team awareness are critical.

6.8.1 VERSION CONTROL

Documents will be stored on the NMDOH SharePoint server in a NMSIIS RFP Project Folder. If a document needs to be changed or updated, the document must be saved and renamed. After changes or updates are made, the renamed document is saved to the project shared folder. Larger documents such as the Project Management Plan will be controlled by the revision history log. Entries will be made into the revision history log when changes are made. A copy of the Project Library will be placed on a PHD share drive on a monthly basis.

6.8.2 PROJECT REPOSITORY (PROJECT LIBRARY)

“Provide to the Department all project management and product deliverables. Deliverables shall include but not limited to the project plan, project schedule, initial and periodic risk assessments, quality strategies and plan, periodic project reports, requirements and design documents for entire project. The lead agency must make available all deliverables in a repository with open access for the Department to review” PROJECT OVERSIGHT PROCESS Memorandum.

The NMSIIS RFP Project will have a folder on a PHD share drive and on the NMDOH SharePoint server for all project documentation.

6.9 PROCUREMENT MANAGEMENT PLAN

Projects often have some element of procurement, i.e. the requirement to purchase goods and/or services from outside the organization. The procedures to be used to handle these procurements should be included here. Activities such as a make-or-buy analysis; writing requirements; solicitation planning, evaluation and selection; inspection and acceptance; contract closeout should all be included.

The NMSIIS RFP Project will be accomplished using an RFP that was published and bid on by various Vendors. The procurement will follow the State Purchasing Division’s process and protocol.

The IV&V vendor will be procured executing a contract against a statewide price agreement.

7.0 PROJECT CLOSE

Project Close will always consist of administrative project activities and possibly contractual project activities and an external vendor is employed. Completing both sets of activities is a mandatory step in the project life cycle. Administrative activities complete the internal needs for the Agency/Unit that is responsible for managing the project, such as lessons learned, recording the last hours against the project, and providing transition for the staff to other assignments. Contractual activities meet the contractual needs, such as executing a procurement audit and formal acceptance of the project work products.

Project Close consists of administrative project activities and contractual project completion activities. It is important for the proper project closeout to complete both sets of activities. Administrative closeout activities complete the agency requirements for the NMDOH who is responsible for managing the project. This includes developing the lessons learned, processing the last of the invoices, and providing a transition plan for system and staff to the production mode. Contract closeout activities complete the contracting requirements, such as the formal acceptance of the project work products and final invoice processing. Required documentation and presentations will also be completed.

7.1 ADMINISTRATIVE CLOSE

Administrative Close occurs at both the end of phase and end of project. This closure consists of verification that objectives and deliverables were met. Acceptance is formalized and phase activities are administratively closed out. Administrative closure occurs on a “by-phase” basis in accordance with the WBS and should not be delayed to project end. At that point, the burden of closing is too great and audits inaccurate. The specific project close activities for a given project are contingent on the project’s

complexity and size. Project managers should work with the project's project management consultant to tailored Project Close procedures to compliment the project's objectives

Administrative Close occurs at both the end of each phase and at the end of project. This closeout activity consists of verification that deliverables were met. Acceptance is formalized and phase activities are administratively closed out. The identification of closeout activities for the NMSIIS Hosting, Support and Maintenance Project will be the final deployment of the integration software and training of all levels of users. The final closeout will include the completion of NMDOH documentation, the DoIT closeout report and a presentation to the DoIT Project Certification Committee for approval to formally close the project

7.2 CONTRACT CLOSE

Contract close is similar to administrative close in that it involves product and process verification for contract close.

Contract closeout activities will include the verification of all contracting requirements, deliverables, and work products. It will also include confirming that all final invoices have been submitted for the Project.

ATTACHMENTS

Attachments are included for additional information, but are not formally considered part of the Project Plan for approvals and change management purposes. Examples

Acronyms, abbreviations and definitions

Acronyms, abbreviations and definitions

This section contains definitions of terms used throughout this procurement document, including appropriate abbreviations:

“Agency” means the State Purchasing Division of the General Services Department or that State Agency sponsoring the Procurement action.

“Authorized Purchaser” means an individual authorized by a Participating Entity to place orders against this contract.

“Award” means the final execution of the contract document.

“Business Hours” means 8:00 AM thru 5:00 PM Mountain Standard or Mountain Daylight Time, whichever is in effect on the date given.

“Close of Business” means 5:00 PM Mountain Standard or Daylight Time, whichever is in use at that time.

“Contract” means any agreement for the procurement of items of tangible personal property, services or construction.

“Contractor” means any business having a contract with a state agency or local public body.

“Determination” means the written documentation of a decision of a procurement officer including findings of fact required to support a decision. A determination becomes part of the procurement file to which it pertains.

“Desirable” – the terms "may", "can", "should", "preferably", or "prefers" identify a desirable or discretionary item or factor.

“Distribution List” means the Agency list that includes the names of all Offerors who submit an Acknowledgement of Receipt form.

“Evaluation Committee” means a body appointed to perform the evaluation of Offerors’ proposals.

“Evaluation Committee Report” means a report prepared by the Procurement Manager and the Evaluation Committee for contract award. It will contain written determinations resulting from the procurement.

“Finalist” means an Offeror who meets all the mandatory specifications of this Request for Proposals and whose score on evaluation factors is sufficiently high to merit further consideration by the Evaluation Committee.

“Hourly Rate” means the proposed fully loaded maximum hourly rates that include travel, per diem, fringe benefits and any overhead costs for contractor personnel, as well as subcontractor personnel if appropriate.

“IIS” means Immunization Information System.

“Immunization Information System” means the electronic record keeping system for immunization records that encompasses software, hardware, network and database.

“Immunization Registry” means Immunization Information System.

“IT” means Information Technology.

“LPB” means local public body

“Mandatory” – the terms "must", "shall", "will", "is required", or "are required", identify a mandatory item or factor. Failure to meet a mandatory item or factor will result in the rejection of the Offeror’s proposal.

“Minor Technical Irregularities” anything in the proposal that does not affect the price quality and quantity or any other mandatory requirement.

“MMIS” means Medicaid Management Information System.

“Multiple Source Award” means an award of an indefinite quantity contract for one or more similar services, items of tangible personal property or construction to more than one Offeror.

“NMDOH” means the New Mexico Department of Health.

“NMSIIS” means the New Mexico Statewide Immunization Information System.

“Offeror” is any person, corporation, or partnership who chooses to submit a proposal.

“Price Agreement” means a definite quantity contract or indefinite quantity contract which requires the contractor to furnish items of tangible personal property, services or construction to a state agency or a local public body which issues a purchase order, if the purchase order is within the quantity limitations of the contract, if any.

“Procurement Manager” means any person or designee authorized by a state agency or local public body to enter into or administer contracts and make written determinations with respect thereto.

“Procuring Agency” means all State of New Mexico agencies, commissions, institutions, political subdivisions and local public bodies allowed by law to entertain procurements.

“Project” means a temporary process undertaken to solve a well-defined goal or objective with clearly defined start and end times, a set of clearly defined tasks, and a budget. The project terminates once the project scope is achieved and project acceptance is given by the project executive sponsor.

“Request for Proposals (RFP)” means all documents, including those attached or incorporated by reference, used for soliciting proposals.

“Responsible Offeror” means an Offeror who submits a responsive proposal and who has furnished, when required, information and data to prove that his financial resources, production or service facilities, personnel, service reputation and experience are adequate to make satisfactory delivery of the services, or items of tangible personal property described in the proposal.

“Responsive Offer” or means an offer which conforms in all material respects to the requirements set forth in the request for proposals. Material respects of a request for proposals include, but are not limited to price, quality, quantity or delivery requirements.

“SPD” means State Purchasing Division of the New Mexico State General Services Department.

“Staff” means any individual who is a full-time, part-time, or an independently contracted employee with the Offerors’ company.

“State (the State)” means the State of New Mexico.

“State Agency” means any department, commission, council, board, committee, institution, legislative body, agency, government corporation, educational institution or official of the executive, legislative or judicial branch of the government of this state. “State agency” includes the purchasing division of the general services department and the state purchasing agent but does not include local public bodies.

“State Purchasing Agent” means the director of the purchasing division of the general services department.

“VTrckS” means the Vaccine Tracking Management System as defined by the U.S. Center for Disease Control (CDC).

“WIR” means the Wisconsin Immunization Registry.

“WSCA” means Westerns States Contracting Alliance.