

APPENDIX B - Project Requirements

Project Management

1. Project plan shall be developed, tracked, and managed using Project Management tools.
2. Project tasks, milestones, critical path, task start and end dates, appropriate resources to accomplish each task, and budget expenditures must be included in the plan. The plan must include development, implementation, testing, and training. The plan must also provide procedures and metrics that will be used in monitoring performance and controlling service activities including security procedures for handling of confidential information. A data conversion schedule is also to be provided. The project plan should also describe the deliverables, alternative solutions, and allow adequate time for deliverable review and approval and the change control process.
3. The vendor shall meet UCP's project team during the first four weeks following award of the contract. During these meetings, a "Detailed Project Plan" shall be developed, reviewed, and revised. UCP shall provide project direction and shall maintain final approval of decisions relating to the overall design/configuration, development, implementation, testing, and acceptance of software.
4. Manage the development and implementation of work by assuring that all phases of the project plan and schedule approved by UCP are accomplished without significant delays or problems.
5. Participate in monthly/weekly project status and performance review meetings to ensure measurable progress is being achieved and UCP's standards are followed. The activities of the vendor project team shall be directed, coordinated and communicated to ensure that the project progresses per project work plan and is completed on schedule.
6. The vendor shall provide detailed, written weekly status reports as appropriate at the stage of the project to the project manager. The status report shall include project status, description of the tasks and goals, work in progress, work accomplishments, date and percentage of work completed, major problems and their resolutions or alternative recommendations, critical issues and their possible solutions, and work planned for the next week.
7. The project plan shall be managed and accomplished by the vendor without significant delays or problems. The vendor shall ensure that the project progresses per the project work plan, is completed on schedule and within budgeted expenditure. Delays due to scope changes or any other reason within or outside of their control shall require prior

approval from UCP. The vendor shall administer work by directing, documenting, communicating, and coordinating work activities of their personnel and all groups related to this project.

8. Work can be performed off-site or on-site depending on tasks such as project status meetings, problem resolutions, implementation, and training. If project team members are working off-site, they shall be available as needed.
9. The vendor and their personnel shall provide information and reports for audits. If needed they shall attend audit meetings.
10. The vendor shall keep UCP personnel informed during development, testing, implementation and operation phases of all modifications.
11. The vendor shall provide a description of the reporting relationships, duties, and responsibilities of supervisory and managerial personnel assigned to the project and delineation of their role in the project.
12. Key technical team member(s) and the project manager shall not be removed from the project without UCP's prior approval.
13. If UCP determines any vendor resource is not meeting expectations on the project, UCP reserves the right to require the resource be replaced.
14. The project manager should have IT project management and system development, implementation experience in managing projects that are similar in scope and successfully implemented. It is preferred that the project manager has experience in the configuration and implementation of an unclaimed property management system.

Quality Control Plan

Within 4 weeks of contract signing, the vendor shall provide to UCP a testing and Quality Control Plan, subject to UCP approval, setting forth the vendor's policies for Quality Control and procedures for implementing those policies. The vendor's Quality Control Plan, at a minimum, shall include the following:

1. How the vendor intends to achieve 100% verification of data migration.
2. How the vendor intends to perform the services under contract according to the highest professional standards.

3. The vendor must develop a complete testing and acceptance plan, and develop testing scripts for approval by UCP.
4. The vendor shall provide updated user manuals prior to the testing and user acceptance phases of the project.
5. The vendor shall provide an efficient way to capture and track all errors occurring during testing and production environment setup, system implementation, data conversion, unit testing, system testing, and training but not limited to these tasks. All errors, their resolutions and alternative proposed solutions should be logged, maintained, and provided to UCP.
6. Provide documentation of services, procedures and metrics to allow for monitoring and controlling quality.

Security Plan

The vendor shall provide a comprehensive security plan within 4 weeks of contract signing. UCP data that include PII - Personally Identifiable Information are highly confidential documents. Some data or information is considered private or confidential; these data types must be protected during transport across the network and also in database files. The system should provide encryption for confidential transactions between the web browser and server and from server to server. Failure to keep this information confidential could lead to legal action against the vendor and/or its employees. Due to this, UCP will require final approval of all staff engaged to system implementation. The vendor, at a minimum, shall provide a comprehensive Security Plan which will include how it intends to meet state and federal data protection laws.