Assembling the Team: Core Project Team

An interactive worksheet



 **Planning**

The individuals making up the core project team are the ones tasked with the ongoing and day-to-day management of the procurement process. They may not have deep IIS subject matter expertise—that may come more from the extended project team (see the **Extended Project Team** worksheet)—but they are or need to become the procurement *process experts* in terms of managing the teams, overseeing all of the steps in the process and managing documentation.

Depending upon how your procurement office is structured (whether it is within or outside of the health department, the number of staff, etc.), a representative of the procurement office may also be on your core team, especially in the beginning when you are researching your options.

*The examples provided are illustrative only; adapt the roles and description as needed to fit your circumstances and needs.*

# Worksheet: core project team

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| **Name** | **Role/title** | **Specific role (s)** |
|  | Project lead | Has overall responsibility for the project; is typically the IIS manager. |
|  | Project manager (from the health department, central project management office [PMO]) or contracted | Develop detailed project plan; ensure all tasks occur within the defined timeframe and budget.*This arguably the most critical role in a successful migration project.* |
|  | Business analyst(s) | Facilitate the process for gathering, defining and documenting system and other requirements; facilitate and document “as-is” and “to-be” workflows/business processes. May play later roles in testing or other areas. |
|  | IT manager(s) | Agency or central IT managers responsible for application development and/or deployment might be good assets on the core team depending on the nature of the procurement. |
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