Assembling the Team: Extended Project Team

An interactive worksheet



 **Planning**

The extended project team provides the content expertise needed at various points in the procurement process; that is, they are likely not required for every step in the process (if so, consider adding them to the core team). The broad expertise available through the extended team helps ensure the system and/or support services being procured fit the needs of the immunization program well. The type of expertise needed will depend in large part on the nature of the procurement; for example, broad expertise is much more critical when procuring a new IIS system than when renewing a maintenance and support contract.

*The examples provided are illustrative only, using a large migration project as an example. Adapt the roles and description as needed to fit your circumstances and needs.*

# Worksheet: extended project team

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| **Name** | **Role/title** | **Specific role(s)**  |
|  | Procurement staff | Ensure procurement process and documents align with jurisdictional procurement policies and standards; serve as a resource to the program. May serve on the core team during the early/research phase of a procurement project.  |
|  | Help desk staff | Help define the parameters for 1st/2nd/3rd-tier help desk roles between program and vendor; provide input on common support needs from users that might be addressed more proactively. |
|  | IIS training staff | Help to bring usability and “trainability” perspective to defining needs and requirements. Can also be invaluable during user acceptance testing. |
|  | VFC staff | Ensure the needs of the VFC program in terms of IIS support are well understood. |
|  | AFIX/IQIP staff | Ensure the needs of the AFIX program in terms of IIS support are well understood. |
|  | Regional immunization staff (if applicable) | Provide input on common support needs from users that might be addressed more proactively. |
|  | Communication staff | Ensure clear and unambiguous communications throughout the procurement process. |
|  | Local health department immunization staff | Provide input on requirements that support local health department immunization activities. |
|  | Stakeholder representatives | It may be advantageous to involve various stakeholder representatives (e.g.*,* clinicians, professional societies, school/child care representatives) as this will ultimately generate more natural buy-in and potentially improve the quality of key decisions. |

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