



Staffing Considerations for Planning and Executing an IIS Platform Migration



When undertaking the complex process of migrating from one platform to another, it is essential that involved stakeholders plan in advance for how the process will impact staff and staffing. The following key considerations are intended to serve as a reference to assist in guiding the project team as they initiate the project.

Helpful hints

- **Bolded text** indicates that the resource referenced is available elsewhere in the IIS Migration Toolkit.

This resource was developed as part of the Immunization Information System (IIS) Migration Toolkit by PHII in partnership with AIRA and CDC and with financial support from CDC. Last updated July 23, 2019. Questions, comments and suggestions are welcomed at phii.org/iiscontact.



Key considerations

- **PLATFORM MIGRATIONS ARE COMPLEX AND RESOURCE-INTENSIVE PROJECTS.** Your program will need to maintain the current system while planning and executing the extensive work to deploy the new system. These projects can easily take two years or more from initiation to closeout. (See the **IIS Migration Project Management Framework** for an overview of the activities involved in a migration project, from initiation through close.)
- **A PLATFORM MIGRATION WILL LIKELY IMPACT EVERY PROGRAM STAFF PERSON AND ALL END USERS.** Everyone needs to know and understand what's at stake, the overall plan, and where and how they specifically fit in.
- **ADEQUATE RESOURCE PLANNING IS CRITICAL**, i.e., getting the right people with the right skills doing the right things at the right time.
- **SENIOR LEADERSHIP SUPPORT** is arguably the single most critical success factor, followed closely by having a dedicated project manager available for the length of the project.
- **A DEDICATED PROJECT MANAGER** actively plans and manages all aspects of a migration project, providing oversight of the cost, schedule, and resource allocation to ensure a successful migration from the old to the new system.
- **AUGMENTING ROLES AND STAFF WILL ALSO LIKELY BE NEEDED** as IIS staff and others from across the immunization program will need to be involved in defining systems requirements, reviewing demos of products, system testing, user training and other aspects of the migration process.
- **CONSIDER HOW OPERATIONAL STAFFING NEEDS WILL CHANGE** through a migration and beyond. Individuals' roles may change and/or additional staff may be necessary as a result of having the new system in place. Consider growth opportunities for current staff.

Program project manager

Having a dedicated, full-time program **PROJECT MANAGER** is almost universally recommended by recently-migrated awardees as a critical success factor. The project manager should represent the immunization program/jurisdiction's interests, working collaboratively with the IIS vendor to provide support through the duration of the project, which may last up to two years.

Responsibilities of the project manager include, but are not limited to:

- Overall responsibilities:
 - Oversee and manage the IIS migration project.
 - Coordinate the completion of programmatic deliverables associated with the replacement IIS system.
 - Provide a holistic view of the project for the rest of the team, including an understanding of different stakeholders' roles and responsibilities (program staff, vendor, central IT, procurement, leadership and others as appropriate).
 - Represent the immunization program's interests in collaboration with the IIS vendor and central IT.
 - Serve as single point of contact for internal stakeholders, IT, solution vendor and/or other third-party organizations providing independent verification and validation, if applicable.
- Planning responsibilities:



- Develop and maintain a detailed project plan, including schedule, resource allocation and activity status, that is kept in sync with the vendor project plan.
- Develop and oversee communications/change management plans.
- Facilitate periodic team status meetings; hold individuals/teams accountable; address/escalate issues as needed per the defined process.
- Identify, implement, track and communicate project performance metrics.
- Testing and implementation responsibilities:
 - Support the planning and execution of user acceptance testing.
 - Create and support staff work groups for specific tasks; e.g., updating help desk procedures.
 - Review and approve all project artifacts and deliverables.
 - Work with central IT and/or the vendor to maintain risk and defect logs.

The project manager also oversees the activities of the business analyst(s) to ensure prioritization and completion of critical tasks. See the **Sample IIS Project Manager Role Description** for additional detail.

Business analyst

Having at least a half-time **BUSINESS ANALYST** for a year, quite likely more, will be crucial in achieving project milestones. Overall, business analyst responsibilities include:

- Facilitate stakeholder sessions to define requirements, especially jurisdictional-specific requirements for the RFP and/or a contract statement of work.
- Work with the vendor on testing and implementing new requirements, functionality and enhancements.
- Re-design staff workflows to optimize new IIS functionality/user interface/outputs.
- Analyze data elements and outputs for current reports and compare to new system outputs to identify any potential gaps.
- Develop and coordinate a data cleansing and migration plan. (*Note: The data cleansing and migration process can require months of effort but will yield a higher quality of data within the current system, as well as in the new system*).

See the **Sample IIS Business Analyst Role Description** for additional detail.

Staff augmentation

Given all the tasks in preparing for and testing the new system while maintaining the old system, staff from across the immunization program and perhaps elsewhere will be engaged (and trained!) to help support these activities. The additional staff should be prepared to take an active role in helping to ensure that program requirements are met (including VFC, AFIX, surveillance and other areas).

Another option for leveraging additional staff resources would be to backfill existing IIS staff who will need to be pulled away from their daily duties to assist with planning and executing various aspects of the migration. This is also a great opportunity to cross-train staff, which is always a good strategy to ensure an agile team with appropriate redundancies in skills (a “deep bench”).



Resource management tools

A list of the resource management and staffing-related tools in the migration toolkit.

- **Project Manager Sample Role Description:** Review sample responsibilities and knowledge, skills and abilities of a project manager.
- **Business Analyst Sample Role Description:** Review sample responsibilities and knowledge, skills and abilities of a business analyst.
- **Responsible, Accountable, Support, Consult, Informed (RASCI) Template:** Clarify and assign responsibilities to accomplish project activities and achieve deliverables. Usually completed as part of the project chartering activities in the Initiate phase.
- **IIS Migration Planning Questionnaire:** Review the resource management/staffing questions to document your approach to staffing. Complete in the plan phase.
- **Project Governance and Roles and Responsibilities Worksheet:** Review standard project roles and responsibilities to map out project staffing needs. Complete in the plan phase.
- **Resource Forecast Template:** Map out and secure project resource (staffing) commitments. Complete in the plan phase.
- **IIS Staff Roles Matrix Template and IIS Sample Staffing Model:** Consider coverage for key operational roles during and after migration.