**RFP 20-1351**

**Payment Processing Services**

**ATTACHMENT O- RESOURCE USAGE GUIDE**

**Instructions:**

Please supply ***all*** requested information ***in the yellow-shaded areas*** and identify any exhibits or attachments that have been included. Label all exhibits and attachments and which section and question they pertain to.

**Resource Hours**

* Please include the estimated resource levels for the Contractor Project Team, State Entity Project Team and the IOT Project Team during implementation and period of time post go-live by completing the table below.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Instructions:** Please provide the number of hours the Respondent expects to commit to the project, and the number of hours estimated for State resources. Ranges of hours are acceptable. These amounts should be based on the functionality the State Entity User desires, included in the Technical Proposal (Attachment F). | | | | | | | | | |
| **Assumptions:** Any assumptions related to the number of the Respondent Project Team, State Entity User Team and the IOT Project Team staff, roles of staff, and duration of involvement used in the development of the resource hour estimates **should be included here:**  The resource information outlined below is specific to Over the Counter (OTC) setups including in person payments with swipe devices and Online OTC payments for State Entities. NIC Indiana has additional products within the NIC Payment Platform that would be assessed differently for all project members. OTC setups for state partners requires less time for the project sponsor and project executive.  The OTC work, along with many CCP integrations, is done simultaneously by the account management team to ensure all aspects of the project are completed correctly and in the shortest period of time possible. | | | | | | | | | |
| **Team** | **Requirements / Process Mapping** | **Development & Configuration** | **Testing** | **Training** | **Data Conversion** | **OCM & Comms.** | **Go-Live Preparation & Execution** | **Production Stabilization** | **Total** |
| Respondent Project Team | 2-6 | 4-8 | 2-6 | 1-3 | 0-8 | 0-3 | 1-2 | 0-1 | 10-37 |
| State Entity User Project Team | 1-4 | 0 | 1-2 | 1-2 | 0-2 | 1-2 | 0-1 | 0 | 4-13 |
| IOT Project Team | 1-2 | 0 | 0 | 0 | 0-2 | 0 | 0 | 0-1 | 1-5 |
| **Total Hours by Project Phase:** | **4-12** | **4-8** | **3-8** | **2-5** | **0-12** | **1-5** | **1-3** | **0-2** | **15-55** |

**Table 1: Contractor Project Team and State Project Team Resource Hours**

* Please include the anticipated resource hour’s levels for the State Entity User and IOT Project Teams based on typical Project role by completing the table below. Any comments related to the anticipated hours or phase-specific involvement, or any assumptions, should be noted in the Additional Respondent Comments column.

**Table 2: Anticipated Hours by Project Role**

| **Project Role**  (e.g. Project Sponsor, Project Manager, Conversion Lead, etc.) | **Estimated Hours Per Month (Ranges Are Acceptable)** | **Estimated Number of Individuals Required for Role** | **Additional Respondent Comments** |
| --- | --- | --- | --- |
| **Project Sponsor/State Entity User** | **4-13** | **1** | **The Project Sponsor is the main point of contact for NIC Indiana from whom to gather requirements, review requirements, gather banking information if applicable, test the payment processing application, provide testing feedback, undergo training, identify other individuals to participate in training and give the final sign off that the application is setup as needed and working properly. Depending on the complexity of the requirements, required reports and the content to be included on the application the project sponsor could spend as little as six hours to just under twenty hours. The NIC Indiana project team has implemented several payment solutions for the state and is able to do much of the work with minimal disruption to the Project Sponsors everyday work responsibilities.** |
| **Project Executive/State Entity User** | **2-13** | **1** | **The Project Executive will spend minimal time on the project and is often times only brought in to review the final requirements, give a final review of the application after testing and is available for additional questions the project sponsor may have. The Project Executive is invited to be included in each phase of the project or can be included as needed. Most of the project work is handled by the Project Sponsor with the Project Executive available for oversight and to answer questions as needed.** |
| **IOT Project Sponsor** | **1-5** | **1** | **The IOT Project Sponsor’s role is to ensure the State Entity has what they need from a technology perspective for the given project. The IOT Project Sponsor will often join for the project kick-off meeting and then is brought it by the NIC Indiana Account Management Team if/when needed. Overall, for payment processing solutions the IOT Project Sponsor is included to oversee that the project runs smoothly for the state entity.** |

* Provide the overall estimated split/division of the work effort as shared between the State Entity User, IOT and the Contractor Project Teams (e.g., the IOT owns 5% of the work effort, State Entity User owns 15% and the Contractor owns 80% of the work effort), along with any narrative to support this estimate.

Comments:

NIC Indiana has a very thorough process identified that will be followed closely by the Account Management Team for migrations to any of NIC’s payment solutions. Specific to this example, NIC Indiana’s Account Management Team will follow the OTC migration plan for both in person payments using swipe devices and OTC online payments to ensure a smooth and efficient migration and to minimize the amount of time needed from the State Entity personnel.

**Table 3: Anticipated Work Effort Division**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **State Entity User Project Team** | **IOT Project Team** | **Contractor Project Team** |
| **Estimated Number of Individuals Required for Project Team** | **1-2** | **1** | **4** |
| **Percentage of Work Effort Owned** | **16%** | **4%** | **80%** |

## Resource Management Plan

* Please describe the resource management plan, and how Contractor and State resources will be managed throughout the project. Provide context based on the estimated number of hours indicated in Tables 1 and 2.

Comments:

NIC Indiana’s Account Management Team will include an Account Manager, Project Manager, Technical Lead and Customer Service Representative who will be the main point of contact for the full project.

The NIC Indiana Account Manager will oversee all payment processing projects from start to finish. This individual’s responsibilities will include, but are not limited to:

• Supervises the device management team

• Responsible for maintaining the overall migration timeline

• Connects with Project Executives to ensure all needs are being met

• Escalation point of contact if needed

• Manages the Account Management Team

• Identifies new payment processing opportunities that will provide a better user experience for end users

The NIC Indiana Project Manager will be the main point of contact for the full project and will ensure the project plan is met and runs smoothly for all parties involved. This individual’s responsibilities will include, but are not limited to:

• Scheduling meetings and trainings

• Developing the project plan

• Writing and distributing meeting minutes

• Collecting project requirements

• Gathering approvals on requirements

• Task management for the full project team

• Writing project documentation/Statement of Work

• Managing project expectations

• Consistent project communication between all parties

• Ensuring timelines are met for tasks/deliverables throughout the project, as well as the final Go Live/Production Rollout timeline

• Liaison between the State Entity and NIC Indiana’s Lead Developer

• Outlining, documentation and executing training

The NIC Indiana Technical Lead will be the main developer to ensure all migrations are successfully completed. This individual’s responsibilities will include, but are not limited to:

• Migrating existing applications to use Common Checkout Pages (CCP) and the Transaction Processing Engine (TPE)

• Support applications leveraging NIC’s Payment Solutions

• Updating applications to meet new security requirements

• Consult third party vendors migrating applications to CCP

• Develop Over-the-Counter payment solutions

• Create applications to use Cashier Mode in CCP for Point-of-Sale (POS) payments

The NIC Customer Service Representative is the main point of contact for end users after an application has been pushed to Production. This individual’s responsibilities will include, but are not limited to:

• Assist end users with application questions

• Effectively communicate refund requests to the appropriate people with the State Entity and internal personnel

• Handle chargeback disputes

The role of the State Entity Project Sponsor and/or the Project Executive is critical to providing a product that meets the State Entity's expectations and business requirements. NIC Indiana will own the vast majority of the work, however, will rely on the State Entity’s Project Sponsor and/or the Project Executive to complete specific action items to ensure the success of the project, such as:

• Provide the business requirements

• Review and approve the final set of requirements provided by NIC Indiana

• Provide all content needed for the application

• Participate in testing

• Take part in training when applicable

• Assist in getting the data to NIC Indiana for data conversion when applicable

• Review and approve project documentation/Statement of Work

The role of the IOT Project Sponsor is to ensure the project runs smoothly for the State Entity. The IOT Project Sponsor is included in all communications and meetings, however, this individual’s responsibilities are minimal.

• Attend the project kickoff meeting, if available

• Assist with any data conversion needs

• Review and approve project documentation/Statement of Work