Release Plan

Purpose

If the project is utilizing releases in its development and implementation approach, a Release Plan describes what portions of the system functionality will be implemented in which releases and the rationale for each release.

A Release Plan is only necessary for a new development or major enhancement project that will utilize a phased or incremental approach for development and implementation. A Release Plan is unnecessary if there is only one release planned (i.e., a phased implementation is not intended).

Document Lifecycle

For new development or major enhancement projects, the Release Plan is closely related to the Implementation Plan that provides the details regarding initial implementation of the releases, including sequencing and site specific information. For systems that are operating in the production environment, a Release Management Plan may be developed as part of the overall Project Management Plan (PMP) instead of a Release Plan and/or Implementation Plan. The Release Management Plan provides detailed information for subsequent planning, management, and monitoring of releases after the project or system has moved into the Operations & Maintenance Phase of the life cycle.

The creation of the Release Plan should begin no later than the Planning Phase, with a baselined version completed by the end of the Design Phase. The Release Plan should be updated any time that the release strategy changes up until the system is fully functional in the production environment.

Audience

The target audience for the Release Plan includes business, technical, governance, and project management stakeholders.

Roles and Responsibilities

The following stakeholders have a prescribed interest in the development, content, review and approval, and execution of the Release Plan:

Stakeholder	Interest
Project Manager	Ensures the Release Plan is appropriately developed, if designated as being required per the Project Process Agreement (PPA). Monitors the actual implementation effort in accordance with the content of the Release Plan, and provides appropriate status reporting as needed. Ensures that the release schedule is integrated into the

	master project schedule.
Government Task Leader (GTL)	Ensures that the Release Plan is delivered in accordance with the requirements of the Statement of Work (SOW) or Task Order (TO).
Business Owner	Approves the final Release Plan, ensuring that the release approach meets the business needs. Also ensures that necessary funding is available for execution of the plan.
System Developer or System Maintainer	Prepares the Release Plan in collaboration with all applicable stakeholders. Updates the Release Plan as needed during the life cycle of the system or situation.
Technical Review Board (TRB)	Reviews and approves the Release Plan prior to its execution. Identifies any issues, risks, or actions that may affect the release approach. Identifies any changes or problems with the Release Plan requiring further consideration and/or updates to the planning document.
ESD Peer Review Group [for ESD IDIQ Contract Task Orders only]	Reviews the Release Plan prior to it being forwarded to the TRB. Identifies any issues, risks, or actions that may affect the release approach. Identifies changes or problems with the Release Plan requiring further consideration and/or updates to the planning document.
ESD Engineering Review Panel (ERP) [for ESD IDIQ Contract Task Orders only]	Reviews the Release Plan and provides input to the TRB regarding any IT engineering and technology issues and challenges associated with the Release Plan.
OIS Stakeholders (e.g., EDCG, EDG, etc.)	Participate in the development of the Release Plan with the System Developer or System Maintainer as needed.
IT Infrastructure Implementation Agent or Contractor	Reviews the Release Plan to understand the approach that will be followed for releasing the new system or major enhancement and its implications to the infrastructure.
IV&V Contractor	Reviews the Release Plan to identify potential improvements or identify problems before they occur.

Related Deliverables

The content of the following deliverables should be considered during the development of the Release Plan:

- Project Management Plan
    - Configuration Management Plan

- o Risk Management Plan
- o Quality Management Plan
- o Financial Management Plan
- o Communication Management Plan
- o Schedule Management Plan
- o Development Approach Plan
- o Staffing Management Plan
- o Release Management Plan
- Project Process Agreement (PPA)
- Requirements Document
- High-Level Technical Design Concept/Alternatives
- Logical Data Model
- System Security Plan (SSP) and/or Information Security Risk Assessment (IS RA)
- System Design Document (SDD)
- Interface Control Document (ICD)
- Database Design Document
- Data Conversion Plan
- Test Plan

Framework Reviews

For new development or major enhancement projects, the Release Plan serves as input to the following System Lifecycle Framework reviews:

- **Preliminary Design Review (PDR) –** During the PDR, the Release Plan is reviewed to ensure that the release approach is feasible and will meet the business needs.

- **Detailed Design Review (DDR) –** During the DDR, the Release Plan is reviewed to ensure that the release approach is still feasible and is consistent with the detailed design.

- **Validation Readiness Review (VRR) –** During the VRR, the Release Plan is reviewed to ensure that the Business Product/Code release being delivered for the Test Phase is consistent with the release approach defined in the Release Plan.

- **Implementation Readiness Review (IRR)** – During the IRR, the Release Plan is reviewed to ensure that the Business Product/Code release being delivered for the Implementation Phase is consistent with the release approach defined in the Release Plan.

- **Operational Readiness Review (ORR) [a.k.a., Production Readiness Review (PRR) for maintenance projects]** – During the ORR, the Release Plan is reviewed to ensure that the Business Product/Code release being delivered for the Operations & Maintenance Phase is consistent with the release approach defined in the Release Plan.

For most maintenance projects, the Version Description Document (VDD) and the Release Management Plan will serve as input to the IRR and ORR in place of the Release Plan and Implementation Plan to cover release and implementation requirements for each release.

Template

A template exists for the creation of this deliverable, which provides a proposed structure for the document and a detailed description of the information content that should be considered for inclusion in a Release Plan.

The template for the Release Plan is available at:
http://www.cms.hhs.gov/SystemLifecycleFramework/03C_Templates.asp#TopOfPage

Other Available Guidance

Not applicable