



<Project Name>

<Deliverable Name>

Deliverable Expectation Document

Version X.XX

Instructions to the Author:

This is a template for developing a Deliverable Expectation Document. Many Suppliers will have their own. In cases when they do not, this template should be offered to them.

The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values and information specific to the project.

Blue italicized text enclosed in boxes provides instructions to the document author, or describes the intent, assumptions and context of the annotated section. This instructional text should be removed from the final document to make the plan more readable. Italicized text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a project. The author should set the style of the text inserted to replace the bracketed text appropriately.

Text and tables with content prefaced with e.g. are provided as examples of wording and/or formats that may be used or modified as required to support a specific project. The information and outline is a suggestion to assist in developing project documents; they are not mandatory formats. The author should tailor the content of the document to fit the project that this work product will support.

Remove these instructions and this page from the final document.

Purpose of the Deliverable Expectation Document:

Over a project's lifecycle, many inputs and outputs are produced. To collate and present these work products in a consistent, structured and comprehensible manner they are generally organized into two types, deliverables and artifacts.

A deliverable is any unique and verifiable product, result, or capability to perform a service that is required to be produced to complete a process, phase, or project.

A project artifact is a tangible by-product of a project. The term is primarily associated with project documentation work products like the requirements backlog, lessons learned reports, business interaction matrices, user stories or use-case diagrams. In many cases, any document created in relation to a project gets tracked as an artifact.

While both deliverables and artifacts are project work products they differ in importance and optics to the client and the project. Where artifacts are building blocks, deliverables are finished products to be delivered.

The Deliverable Expectation Document (DED) presents pertinent information (e.g., deliverable description, applicable industry standards, CT contract or SOW references, acceptance criteria and schedule) specifying the expectations of a deliverable. The DED is reviewed and approved by both DSS, the project team and the vendor producing the deliverable (if applicable) to ensure agreed-upon expectations are clearly defined before the deliverable is developed.

This template describes the required contents of a deliverable expectation document. Reference the Request for Proposal, the CT contract and/or Statement of Work where appropriate in this DED. Work plans that support the activity summary should be attached, and may be referenced to support the methodology and schedule summary.

The DED at minimum must include:

- Deliverable name
- Deliverable purpose
- An outline of the scope, plan, and approach to document [what is being addressed by the deliverable]
- Deliverable acceptance criteria

Remove this page from the final document.

<Deliverable Name>

Deliverable Expectation Document

Contents

Revision History	3
Introduction	4
Description	4
Applicable Standards	4
Deliverable Outline/Requirements	5
Assumptions & Dependencies	5
Deliverable Expectations.....	5
Acceptance Criteria.....	5
Review & Approval Timeline.....	6
Approval.....	6

Revision History

Date	Version	Author(s)	Notes
1/8/2018	0.01		

<Deliverable Name>

Deliverable Expectation Document

Introduction

Provide a brief overview defining the purpose of the deliverable and how it fits within the overall completion of the project. Indicate if there are pre-requisite tasks and subsequent tasks. The DED should reference all artifacts and work products comprising the deliverable.

Remove this instruction text from the final document.

The Deliverable Expectation Document (DED) is used as an overall blueprint for the development of a deliverable. The purpose of this DED is to ensure a common understanding between the < CLIENT NAME> and <NAME OF TEAM/VENDOR DEVELOPING THE DELIVERABLE> regarding the scope and content of this deliverable prior to beginning work. The objective of the <DELIVERABLE NAME> DED is to provide a structured, documented, and mutually agreed upon plan to deliver the deliverable for the <PROJECT NAME> project.

This DED must be approved by <CLIENT NAME> prior to the start of work to develop this deliverable. This DED will be the primary reference used during the review process to validate the acceptance of this deliverable on completion.

Description

Provide a brief description of the deliverable. Describe the deliverable's objectives, scope, and purpose. Discuss the level of detail to be provided such as "will describe the rationale for design decisions, will provide a textual summary of the design with detailed design pseudocode in the appendices, will include database schema diagrams and database table relationships, field sizes and descriptions, and indices and keys."

Discuss the intended audience. If the deliverable assumes a specific knowledge level, list the key concepts that must be understood (e.g., understanding of backup rotation schedules, understanding of registry editing, etc.). Do not use vague terms such as "basic knowledge of system administration." Indicate if there are pre-requisite tasks on which this deliverable depends and/or if there are subsequent tasks that are dependent on this deliverable.

Remove this instruction text from the final document.

The scope of the <DELIVERABLE NAME> deliverable will include the following:

- <List all items that will be in scope of this deliverable>

The scope does not include the following:

- <List all items that will not be in scope of this deliverable>

Applicable Standards

List the specific industry and/or government standards which must be observed or met on completion of this deliverable. Do not simply list "industry standards" or "IEEE." Indicate if the format/order of the standard must be observed.

Remove this instruction text from the final document.

Following industry and department best practices, the <DELIVERABLE NAME> deliverable must

- Comply with state and federal security statutes and regulatory requirements and DSS policies
- Integrate with agency Business Continuity and Disaster Recovery systems
- Meet the privacy requirements of the
 - National Institute of Systems and Technology (NIST) Special Publication 800-53 r4,
 - Security and Privacy Controls for Federal Information Systems and Organizations,
 - IRS Publication 1075,
 - CMS MARS-E v2.0
 - HIPAA Security Rules

<Deliverable Name>

Deliverable Expectation Document

Deliverable Outline/Requirements

List any required templates, diagrams, tables, or specific content required for this deliverable. For instance, in design and test deliverables, an updated requirements traceability matrix might be included in the final deliverable.

IF THE DELIVERABLE IS A PROJECT DOCUMENT; list the table of contents or outline of the document. Discuss the content of each major section. Where appropriate or as requested by the project, provide a sample of this document from other engagements/projects or sample content, level of detail, and format of key sections.

IF THE DELIVERABLE IS NOT A PROJECT DOCUMENT; list or reference the specific requirements for this deliverable from the Request for Proposal, Statement of Work, and/or contract. List the specific source(s) of the requirement(s).

Remove this instruction text from the final document.

#	Rqmt/Document Section	Description	Source
1	e.g., Introduction	A high-level description of the deliverable	Project Design Rqmt #010
2	Scope	A list of features & functions	Project Design Rqmt #010
3	System Template		
4			

Assumptions & Dependencies

List all the known assumptions and dependencies required to produce this deliverable.

Remove this instruction text from the final document.

Deliverable Expectations

Acceptance Criteria

List the specific acceptance criteria for the deliverable. The first criteria should always be “were the requirements met.” The criteria should be specific to the deliverable and indicate key needs of the project (e.g., must include detailed description of database sizing, growth considerations, performance considerations, and de-/normalization considerations).

Other general review criteria (which are primarily the same for all deliverables) may be referenced or attached. The following are the minimum acceptance criteria:

- Did the deliverable comply with the applicable standards?
- Were all requirements met?
- Did the deliverable comply with the stated format requirements?
- Is the deliverable consistent with other deliverables already approved?
- Did the deliverable meet the general review criteria (e.g., pages numbered, free of formatting and spelling errors, clearly written, no incomplete sections, etc.)?

Remove this instruction text from the final document.

The following acceptance criteria will be used for the <DELIVERABLE NAME> Deliverable Document DED:

- Review and incorporation of pertinent comments provided during the deliverable walkthrough
- Incorporation of pertinent feedback provided during the deliverable review process

<Deliverable Name>

Deliverable Expectation Document

Review & Approval Timeline

List the key activities and due dates in the preparation and review of this deliverable. If appropriate, list key meetings, walkthroughs, inspections, and reviews. These tasks should be consistent with the activities and dates in the workplan and contractual timeframes regarding deliverable delivery, review, and approval/rejection.

Include time for state review of the deliverable and contractor incorporation of comments. Indicate if any activities/dates are on the critical path or have significant dependencies.

Remove this instruction text from the final document.

The document will be delivered through email and maintained in project repository, currently maintained by <VENDOR/NAME OF TEAM DEVELOPING DELIVERABLE] project team. The intended audiences for this document are as follows:

- <CLIENT> Project Manager and selected staff
- <CLIENT> Executive Leadership and selected staff

The turnaround time for the submission, review, revision, and acceptance of this deliverable from the date of submission is as follows:

Due Date	Key Activity	Comments

Approval

List the responsible persons who have the authority to accept this Deliverable Expectation Document and approve the start of development of the deliverable.

Remove this instruction text from the final document.

Role	Name & Title	Signature	Date