Release Deployment Package

<Project Name>

U.S. Department of Housing and Urban Development

<Month, Year>

Project Information

	Information
Project Name	*<Project Name>*
Project Acronym	*<Project Acronym>*
Project Cost Accounting System (PCAS) Identifier	*<PCAS Identifier>*
Document Owner	*<Owner Name>*
Project Manager Name	*<Project Manager Name>*
Version/Release Number	*<Version/Release Number>*

Revision History

<Provide information on how the development and distribution of the Release Deployment is controlled and tracked. Use the table below to provide the release number, date, author, and a brief description of the reason for creating the revised version.>

Release No.	Date	Author	Revision Description

Table of Contents

1. Overview

1.1 Purpose
<Provide the purpose of the Release effort for the project. Include the solution/service characteristics, its software and architectural complexity, its geographic Release, the number of planned releases, the number of operators required (if any), and the anticipated number of users. Provide the initial operability date.

Indicate if the system is a new, enhanced, integrated, or migrated version of an existing system. Be sure to include information about whether the introduction of the system will affect any existing databases or systems.>

1.2 Release Roles and Responsibilities
<Provide a list of activities required for Release and the project staff (HUD or contractor) responsible for the activity and its completion. Use the table below to describe how different project roles contribute to the Release effort for the project. Refer to the ITM Roles and Responsibilities document as necessary when identifying roles. Use positions or job titles rather than the names of individuals.>

Role	Name	Release Responsibilities
Identify Role	*Identify the person responsible*	*Identify area of responsibility*

Table 1 - Release Roles and Responsibilities

2. Release Deployment
<Identify the key activities for deploying the system. Describe the effort involved for each type of activity, when each should be initiated, and any interdependencies within the project or with outside systems, applications, and data sources. Use the subsections below to describe typical Release activities that should be considered.>

2.1 Release Scope
<What is the scope of work for this release? What additional functionality, capabilities, and/or improvements will be included in this release? What is the content of this release? Include physical changes in addition to logical and a summary of significant changes and links to relevant release documentation.>

2.2 Assumptions
<Describe the assumptions about the current capabilities and use of the solution when it is released to production. List any assumptions made due to lack of information, e.g., ambiguous sections in the specifications, assumptions about other systems or where requirements analysis was unclear.>

Assumption	Impact
Describe the assumption	*Discuss its effect on the Release Deployment*

Table 2 – Assumptions

2.3 Dependencies and Interfaces

<Describe any necessary coordination with owners of other systems, applications, or databases with which this system interfaces. Include situations such as those where the data interchange has been modified, where a new piece of support software has been upgraded or replaced, or where a supporting platform has been upgraded or replaced. Identify the testing to be performed with these other systems, including the use of live data and operational software, to verify proper operation prior to cutover.>

Dependency	Impact
Describe the dependency e.g., Budget	*Discuss its effect on the Release Deployment*

Table 3 – Dependencies

2.4 Constraints

< Describe factors that may affect the system deployment, such as staff, budget or schedule constraints. Identify constraints due to group involvement, external systems or infrastructure constraints.>

Constraint	Impact
Describe the constraint e.g., Technical	*Discuss its effect on the Release Deployment*

Table 4 – Constraints

2.3 Risks

<Identify potential risks associated with the system's release. Describe any adverse impacts to stakeholders during the release cycle. Provide a mitigation strategy for each risk that describes the contingency if a risk is realized. Track this in the Risk List and coordinate with the Risk Management Plan.>

Risk Type	Details	Risk Rating	Contingency
		[Low/Medium/High]	

Table 5 - Risks

3. Release Approach

<The Release Approach is only necessary for a program or project that will be utilizing a phased or incremental approach for its development and/or Release activities. The Release Approach content is unnecessary if there is only one Release Deployment for all the requirements defined in the Requirements

Definition Document (i.e., a phased Release is not intended). Describe the strategy and activities addressed in the planning for the release. The Release Approach describes what portions of the system functionality will be developed and implemented in which releases and the rationale for each release and as such, is part of the Release Deployment. This Release Deployment provides the details regarding initial Release of the releases, including sequencing and site-specific information.>

3.1 Rationale

<Describe the rationale for establishing this release approach. Reference any information or other deliverables (e.g., Requirements Definition document, Technical Design document, Project Management Plan, Communication Management Plan, Procurement Management Plan, Risk Management Plan, and Project Tailoring Agreement (PTA)) that may have influenced the development of the release approach. Include key considerations such as how the assumptions, constraints, and risks from the previous section impact the release approach. Also consider lessons learned from other Releases.>

3.2 Release Strategy

<Describe at a high level the overall strategy for segmenting the delivery of the solution into specific releases. Identify if the release strategy is for a phased function rollout/Release or for a phased user base rollout/Release.>

3.3 Release Content

<Identify each specific release, including a description of the functionality to be delivered in each release. Explain what the proposed system will do (and not do, if necessary). Map individual requirements from the Requirements Definition document to the specific release(s) that will provide that functionality, as appropriate. Provide any additional rationale for dividing the content into the specific releases.>

3.4 Release Notification

<If there is release-specific communication that needs to occur that is not already described in the Project Management Plan (Communication Management Plan), please describe here. Specify the individual stakeholders and/or groups requiring notification of an impending release. Also, describe the method for providing notification prior to and/or following successful release of the solution. Specify the information required by each person or group and the timeframes for receipt of the information, prior to release. For example, the helpdesk may require that a notification be received 10 days prior to release. Provide the release date, a user impact assessment, and a helpdesk impact assessment.>

3.5 Release Management

<Identify the activities used to manage the planning, organization, development, testing, and Release of new features and functions, defects, change requests, etc. into the application being developed. Identify the individuals involved in a typical release process.

Develop a release checklist to help the project team identify when the product is ready for release for use by the customer.

Develop a release checklist to identify when the product is ready for release.>

Release Deployment	Description
Plan	*Identify scope of the release. You can add multiple changes to a release. Ensure the source configuration items (CIs) are associated with the release. Prepare a task list for each release activity and task.*
Build	*Identify the installation scripts and packages to be deployed. Develop installation scripts, reports, and related procedures.*
Test	*Test the release package. Review the release package to ensure it can be accepted for deployment. Add the package to the necessary repository.*
Plan Rollout	*Create detailed plans, including release dates and deliverables, to roll out at each site. For each site, schedule delivery for new functionality that are part of the release. Schedule training if needed.*
Communicate	*Ensure stakeholders, end users, and support staff are aware of the proposed changes in the new functionality. To ensure a deployment is ready, schedule testing, system shutdowns, reminders, and so on.*
Install	*Confirm with Configuration Management the status of CIs involved in the release. Ensure target CIs are ready for release. Distribute the release to target CIs.*
Distribute	*Identify what's included in the release. You can add multiple changes to a release. Ensure source configuration items (CIs) are associated with the release. Prepare a task list for each release activity and task.*

Table 6 – Release Management Activities

4. Release Testing

<All releases are subject to testing in accordance with the standard release management process. This section should outline the plans and logistics for completing the testing for this specific release. Additionally, any omissions or alterations to the testing process must be identified. Testing results will be documented, aggregated, and communicated to relevant stakeholders for review (in accordance with the notification plan outlined in the previous section) prior to the approval of the deployment. >

4.1 Internal Testing

<Describe the testing strategy that should be carried out to ensure that the application is stable and identify any outstanding issues for investigation and resolution.>

4.2 User Acceptance Testing

<Describe how end users will be involved in testing the upcoming release. Describe the process for user testing including the users needed to test, what tests will be completed, and logistics for the testing.>

5. Release Schedule

<Provide a summary schedule for the activities related to production Release. Indicate which activities must be performed before the actual Release commences, as well as the activities related to Release itself.

If Release will be done at multiple sites, provide a "model" schedule to show the details of a generic site Release, and then indicate the start and completion date of each site to be installed in the overall schedule.

If the system is to be deployed incrementally in multiple builds or releases, provide a detailed schedule for each build or release.>

6. Release Impact

<Describe how the solution's Release is expected to impact the network infrastructure, support staff, user community, etc. Include any references to service level agreements that describe the performance requirements, availability, security requirements, expected response times, system backups, expected transaction rates, initial storage requirements with expected growth rate, as well as helpdesk support requirements.

Describe any changes that are needed to existing service level agreements, or any new service level agreements that may be needed to operate and maintain the system. Explain how the service level agreement will be monitored and adjusted, if necessary.>

Appendix A: References

<Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.>

Table 7 below summarizes the documents referenced in this document.

Document Name	Description	Location
<Document name and version number>	<Document description>	**<URL to where document is located>**

Table 7 - Appendix A: References

Appendix B: Release Deployment Approval

The undersigned acknowledge they have reviewed the Release Strategy and authorize the <Project Name> project. The undersigned give the Project Manager the authority to apply the approved level of organizational resources to project activities. Changes to this document will be coordinated and approved by the undersigned or designated representatives.

[List the individuals whose signatures are required. For example, Project Sponsor and appropriate stakeholders. Add additional lines as necessary.]

Signature: _____   Date: _____

Print Name: _____

Title: _____

Role: _____

Signature: _____   *Date: _____*

Print Name: _____

Title: _____

Role: _____

Appendix B: Key Terms

Table 8 below provides definitions and explanations for terms and acronyms relevant to the content presented within this document.

Term	Definition
[Insert Term]	**<Provide definition of term and acronyms used in this document>**

Table 8 - Appendix B: Key Terms