Trustee Web Database System

May 24, 2012

Project Summary

The Ohio Board of Regents (OBR) is charged with monitoring and tracking the appointment and vacancies at all of Ohio's public colleges and universities. Currently there is no standardized method for:

1. Tracking trustee appointment status, appointment date, term dates, trustee vacancies or Senate confirmation date
2. Informing the institutions of higher education, Attorney General's office, general public and the legal counsels at each respective school, of new Trustee appointments by the Governor

Additionally, there is no central location where institutions of higher education, stakeholders and the general public can go to easily view or obtain information about the Trustees at the respective Ohio public colleges and universities.

Project Goal

The project goal is to provide the Ohio Board of Regents with a Project Management Plan which includes the development of:

1. A database of the Trustee information
2. A website where stakeholders and the general public can view information about the Trustees

Project Outcome

The outcome of this project is a Project Management Plan for the Ohio Board of Regents to develop a process in which there is one (1) source of information (The Governor's Office on Boards and Commissions) which will retrieve information about the Ohio public colleges and universities Trustees. The information collected will be input and stored in a database and displayed on a webpage, connected to the existing Ohio Board of Regents website.

The process should include the following deliverables:

- Connection to the internet
- Publish information on the internet
- 24-hour access via the internet
- Maintain current and historical data on the Trustees
- Secure confidential information
- Produce reports based upon searchable criteria
- Generate email notifications for internal and external customers
- Convert and/or migrate existing data
- Provide training and outreach for customers

Project Benefits

The implementation of the Project Management Plan will be a benefit to the Ohio Board of Regents by reducing public information inquiries, reducing internal processing time of Trustee information requests, improving data accuracy, increasing public accessibility to Trustee information and providing greater staff utilization.

Project Team

For more information about this project, contact team members:

- Terence Carter, Team Lead terence.carter@epa.state.oh.us
- Robert Feldmann rfeldmann@age.state.oh.us
- Kelli Foreman kelli.young@epa.state.oh.us
- Anita Jones anita.jones@das.state.oh.us
- Melissa Marshall mmarshall@regents.state.oh.us
- Latonya White latonya.white@mh.ohio.gov

OHIO BOARD OF REGENTS

Project Charter

Project: Trustee Web Database System	**Date Prepared:** 08 May 2012
Project Sponsor:	Sloan Spalding
Project Manager:	Terence Carter
Project Customer:	Ohio Board of Regents

Project Purpose or Justification:

The Ohio Board of Regents (OBR) is charged with monitoring and tracking the appointment and vacancies at all of Ohio's public colleges and universities. Currently there is no standardized method for:

1. Tracking which trustees are appointed, appointment date, term dates, trustee vacancies or Senate confirmation date.
2. Informing the institutions of higher education, Attorney General's office, general public and the legal counsels at each respective school, of new Trustee appointments by the Governor.

OBR currently collect information about the Ohio college and university Trustees. The information is collected from a variety of sources: the Governor's Office on Boards and Commissions, institutions of higher education, Gongwer or Hannah news sources and/or the Ohio General Assembly. OBR staff obtains Trustee information, it is manually entered into an Access database, which is not connected to the internet and is not accessible to the public. Whenever there are questions about Trustee information, it is up to staff, who are not trained in Access, to retrieve the information and create reports. Due to conflicting information from sources and human error, there have been several instances of inaccurate information being released to stakeholders and the general public.

Additionally, there is no central location where institutions of higher education, stakeholders and the general public can go to easily view or obtain information about the Trustees at the respective Ohio public colleges and universities. OBR staff members routinely take time away from other work duties in order to provide information to callers, e-mailers and individuals making public records requests.

Project Description:

To provide the Ohio Board of Regents with a project management plan which includes the development of: 1) A database of the Trustee information, and 2) A website where stakeholders and the general public can view information about the Trustees.

Project and Product Requirements:

There will be one source of information, the Governor's Office on Boards and Commissions, which will retrieve information about the Ohio public colleges and universities Trustees. The information collected will be input and stored in a database, which should perform the following tasks:

- Connect to the internet
- Make information available on the internet
- Searchable
- 24 hour access via the internet
- Maintain historical data on the Trustees
- Convert and/or migrate existing data
- Secure confidential information
- Produce reports based upon searchable criteria
- Generate email notifications for internal and external customers

Acceptance Criteria:

1. Creation of a framework for the database that will house information about all Trustees at Ohio's public colleges and universities
2. Reduce public information inquiries by 50%
3. Reduce internal processing time of Trustee information requests
4. Improve data accuracy by 90%
5. Increase public accessibility to Trustee information

Initial Risks:

- Lack of resources for training and/or project implementation
- Competing with higher priority projects
- Lack of utilization by external stakeholders
- Human error

Ohio Board of Regents

Requirements Documentation

Project: Trustee Web Database System **Date Prepared:** 10 May 2012

Stakeholder	Requirement	Acceptance Criteria	Comments
OARnet	Create a database that is capable of storing current and historical information on Trustees	Sufficient capacity to retain and retrieve information quickly	
OARnet	Create a searchable webpage that publishes Trustee information for a public audience that includes the following fields: trustee's name, institution, start of term, end of term, e-mail, position title, appointed by, senate confirmation date, vacancy flag, and bio	Reduce public information inquiries by 50%	
OARnet	Updated information should be automatically uploaded to the internet website	Increase public accessibility to Trustee information	
OARnet	Generate detail and summary reports that are searchable by OBR staff	Reduce internal processing time of Trustee information requests; Improve data accuracy by 90%	
OARnet	Data entry interface that contains: trustee's name, institution, start of term, end of term, address, phone, e-mail, position title, business title, appointed by, senate confirmation date, vacancy flag, bio, and primary institutional contact	Ability to enter and save trustee information	

Stakeholder	Requirement	Acceptance Criteria	Comments
OARnet	Internal searchable interface on the following fields: trustee's name, institution, start of term, end of term, address, phone, e-mail, position title, business title, appointed by, senate confirmation date, and vacancy flag.	Ability to view search results	
OARnet	Export search results into formats including PDF and/or Excel.	Ability to view exported information	
OARnet	Securely protect sensitive and/or personal information such as: trustee's address and phone number.	Reduced risk of security exploits	
OARnet	Send e-mail notifications to respective institution's primary contact when there is a change in trustee status.	Successful transmission of trustee information	
OARnet	Migrate old data from a standard Microsoft Access database into the new system. Access file can be provided upon request.	Ability to view accurate mapped historical information in the new system	
OBR	Provide training to users on the new software tool.	Staff are successfully using the new system	
OBR	Announce new trustee software tool availability on the main OBR website.	The public is aware of new trustee webpage	

OHIO BOARD OF REGENTS

Project Scope Statement

Project: Trustee Web Database System **Date Prepared:** 25 April 2012

Product Scope Description:

The Ohio Board of Regents (OBR) is charged with monitoring and tracking the appointment and vacancies at all of Ohio's public colleges and universities. Currently there is no standardized method for:

1. Tracking which trustees are appointed, appointment date, term dates, trustee vacancies or Senate confirmation date.
2. Informing the institutions of higher education, Attorney General's office, general public and the legal counsels at each respective school, of new Trustee appointments by the Governor.

Project Deliverables:

There will be one source of information, the Governor's Office on Boards and Commissions, which will retrieve information about the Ohio public colleges and universities Trustees. The information collected will be input and stored in a database and displayed on a webpage, connected to the existing Ohio Board of Regents website.

The deliverables for this project are listed below:

- Connect to the internet
- Publish information on the internet
- 24 hour access via the internet
- Maintain current and historical data on the Trustees
- Secure confidential information
- Produce reports based upon searchable criteria
- Generate email notifications for internal and external customers
- Convert and/or migrate existing data
- Provide training and outreach for customers

Project Acceptance Criteria:

1. Creation of a framework for the database that will house information about all Trustees at Ohio's public colleges and universities
2. Reduce public information inquiries by 50%
3. Reduce internal processing time of Trustee information requests
4. Improve data accuracy by 90%
5. Increase public accessibility to Trustee information

Project Exclusions:

Creating the process of what is considered to be a “reliable source” for the Trustee information

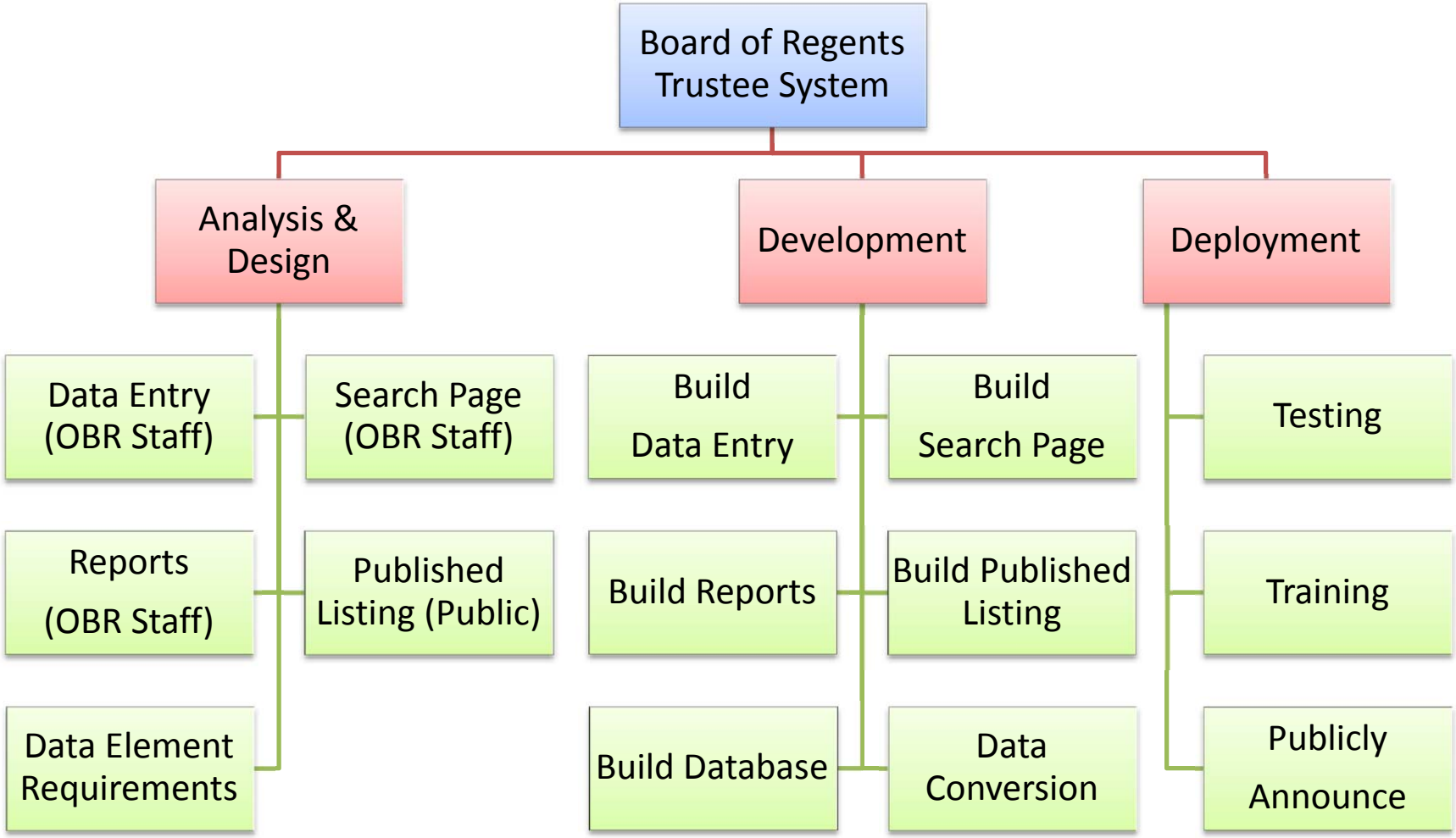
Project Assumptions:

The “reliable source” in regard to Trustee information will come from the Governor’s Office on Boards and Commissions.

Ohio Board of Regents

Work Breakdown Structure

Project: Trustee Web Database System **Date Prepared:** 25 April 2012



OHIO BOARD OF REGENTS

Project Schedule

Project: Trustee Web Database System | **Date Prepared:** 22 May 2012

ID	Task Name	Duration	Start	Finish
1	**Board of Regents**	40 days?	07/02/12	08/24/12
2	**1.0 Project Initiation**	2 days	07/02/12	07/03/12
3	Create Scope of Work	1 day	07/02/12	07/02/12
4	Identify Stakeholders	1 day	07/02/12	07/02/12
5	Scope of Work Approval	1 day	07/03/12	07/03/12
6	**2.0 Project Planning**	7 days	07/04/12	07/12/12
7	**Project Charter**	2 days	07/04/12	07/05/12
8	Initial Project Charter	1 day	07/04/12	07/04/12
9	Initial Project Charter Signoff	1 day	07/05/12	07/05/12
10	**Project Planning documents**	2 days	07/06/12	07/09/12
11	Complete Project Scope Statement	2 days	07/06/12	07/09/12
12	Create Project Cost Analysis Spreadsheet	1 day	07/06/12	07/06/12
13	Establish the Communications Management Plan	1 day	07/06/12	07/06/12
14	Create Work Breakdown Schedule (WBS)	2 days	07/06/12	07/09/12
15	Determine Project Team	1 day	07/04/12	07/04/12
16	Hold Project Kickoff Meeting	1 day	07/06/12	07/06/12
17	Determine Roles and Responsibilities	1 day	07/05/12	07/05/12
18	Establish Weekly Pproject Status Meetings with Agenda	1 day	07/05/12	07/05/12
19	**Requirement Documents**	3 days	07/10/12	07/12/12
20	Create Requirements Document	3 days	07/10/12	07/12/12
21	Receive Approval for Requirements	1 day	07/10/12	07/10/12
22	**3.0 Project Execution**	34 days?	07/09/12	08/23/12
23	Development	31 days?	07/11/12	08/22/12
24	**Create Analysis/Design Solution**	15 days	07/11/12	07/31/12
25	Data Entry Page	3 days	07/11/12	07/13/12
26	Search Page	3 days	07/16/12	07/18/12
27	Published Listing	3 days	07/19/12	07/23/12
28	Reporting Module	3 days	07/24/12	07/26/12
29	Database Element Requirements	3 days	07/27/12	07/31/12
30	**Implement Design/Develop solution and software**	14 days?	08/01/12	08/20/12
31	Data Entry Page	3 days	08/01/12	08/03/12
32	Search Page	3 days	08/06/12	08/08/12
33	Published Listing	1 day?	08/09/12	08/09/12
34	Reporting Module	3 days	08/10/12	08/14/12
35	Build Database	3 days	08/15/12	08/17/12
36	Data Conversion	5 days	08/14/12	08/20/12

ID	Task Name	Duration	Start	Finish
37	Conduct Unit Testing	3 days	08/20/12	08/22/12
38	**Testing**	5 days	07/13/12	07/19/12
39	Create Test Scenarios and Test Scripts	1 day	07/13/12	07/13/12
40	Conduct Required Types of Testing	3 days	07/16/12	07/18/12
41	Document Test Results	1 day	07/19/12	07/19/12
42	Resolve Issues	2 days	07/16/12	07/17/12
43	**Deployment**	30 days?	07/13/12	08/23/12
44	Plan Implementation/Rollout	1 day	07/13/12	07/13/12
45	Training	2 days	07/16/12	07/17/12
46	Public Announcement	1 day	07/18/12	07/18/12
47	Complete Production Rollout	1 day?	08/23/12	08/23/12
48	Execute Communication Plan	1 day	07/09/12	07/09/12
49	Conduct Weekly Status Meetings	30 days	07/09/12	08/17/12
50	**4.0 Project Monitoring and Control**	30 days	07/06/12	08/16/12
51	Deliver Project Status Report	30 days	07/06/12	08/16/12
52	Conduct Project Cost Analysis	30 days	07/06/12	08/16/12
53	Manage Project Change Control	30 days	07/06/12	08/16/12
54	Manage Change Requests	30 days	07/06/12	08/16/12
55	Manage/Resolve Risks	30 days	07/06/12	08/16/12
56	Manage/Resolve Action Items	30 days	07/06/12	08/16/12
57	Manage/Resolve Issues	30 days	07/06/12	08/16/12
58	Manage/Resolve Decisions	30 days	07/06/12	08/16/12
59	Conduct Reviews	30 days	07/06/12	08/16/12
60	**5.0 Project Closing**	1 day	08/24/12	08/24/12
61	Finalize Delivery	1 day	08/24/12	08/24/12
62	Conduct Lessons Learned	1 day	08/24/12	08/24/12
63	Update the Estimation Matrices	1 day	08/24/12	08/24/12
64	Close and Archive Records	1 day	08/24/12	08/24/12
65	**Maintain the Project Schedule**	30 days	07/06/12	08/16/12
66	**Manage Project Information**	30 days	07/06/12	08/16/12

Project Cost Analysis

Project: Trustee Web Database System **Date Prepared:** 17 May 2012

Assumptions	
Contingency	15%
Hours per month	160

Resource	Rate
	$ -
Project Manager	$ 90.00
DataBase Admin	$ 100.00
Web Developer	$ 70.00
	$ -
Additional Resource II	$ -

Project Initiation Expenses

Role	Resource Type	FTE	Months	Hours		Rate		Est. Cost
PM	Project Manager	0.5	0.1	8.0	$	90.00	$	360.00
DBA Technical Lead	DataBase Admin	0.5	0.1	8.0	$	100.00	$	400.00
Web Developer Lead	Web Developer	0.5	0.1	8.0	$	70.00	$	280.00
Total		1.5	0.2	24.0			$	1,040.00

Project Execution Expenses - Human Resources

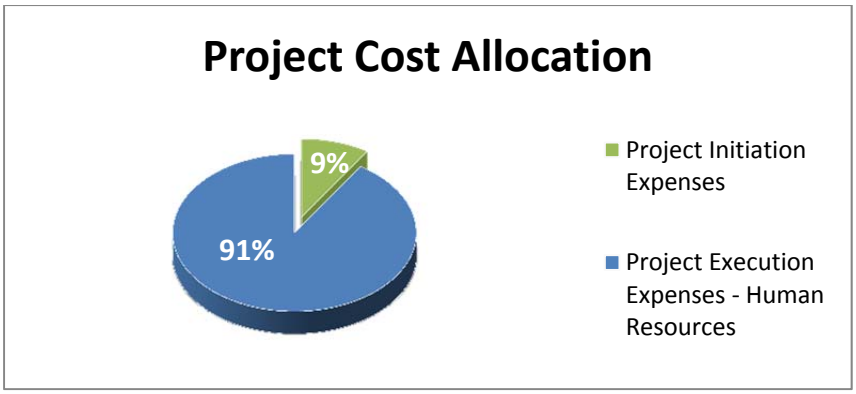
Role	Resource Type	FTE	Months	Hours		Rate		Est. Cost
PM	Project Manager	0.5	0.5	80.0	$	90.00	$	3,600.00
DBA	DataBase Admin	0.5	0.5	80.0	$	100.00	$	4,000.00
Web Developer	Web Developer	0.5	0.5	80.0	$	70.00	$	2,800.00
	Additional Resou	-	-	-	$	-	$	-
Total		1.5	1.5	240.0			$	10,400.00

Project Execution Expenses - Hardware & Software Costs

Equipment		Est. Cost
Server	$	-
Software License	$	-
1 Year Gold Support	$	-
Total	$	-

Total Project Costs

Project Initiation Expenses	$	1,040.00
Project Execution Expenses - Human Resources	$	10,400.00
Project Execution Expenses - Hardware & Software	$	-
Total	**$**	**11,440.00**



OHIO BOARD OF REGENTS

Communications Plan

Project: Trustee Web Database System **Date Prepared:** 17 May 2012

Event	Target Audience	Description	Timing	Vehicles	Sender	Impacts
OBR Project Core Team Meeting's Agenda and Minutes	OBR Project Team	Agenda should include at a minimum: the invited attendees, review of assigned action items, review of the project status, and a section to cover any new assigned action items.	Meeting minutes should be uploaded and/or circulated to the core team in a timely manner.	E-Mail, SharePoint and/or shared drive	Designated Member of the OBR Project Team	This will provide a means to assess the ongoing progress of the project and ensure that the team can immediately address any changes or unexpected events.
OBR Project Core Team Meeting Communications	OBR Project Team	Communicate and confirm all decisions or agreements made, and any action items (with the assignee established) during the Project Team meeting.	Weekly or sooner if needed.	E-Mail, SharePoint and/or shared drive	Designated Member of the Project Team	This will provide an ongoing repository of all established agreements, suggestions or assignments, including documentation sent throughout the Project Team.
Weekly OBR Project Status Updates	OBR Project Team	Project's status, high level achievements and any possible risks or issues, including conflicts.	Weekly or bi-weekly	E-Mail, SharePoint and/or shared drive; Meetings	Project Manager	The stakeholders are informed of the project status.

Definitions:

Event – trigger that causes a necessary communication.

Target Audience – who needs to know; “Who”.

Description – content of the communication; “What”.

Timing – the frequency of the message; “When”.

Vehicles – the communication approach; “How”.

Sender – the person distributing the message.

Impact – effect of the communication; goal low effort, high impact.

Trustee Web Database System

May 24, 2012

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Project Team

For more information about this project, contact team members:

- Terence Carter, Team Lead terence.carter@epa.state.oh.us
- Robert Feldmann rfeldmann@age.state.oh.us
- Kelli Foreman kelli.young@epa.state.oh.us
- Anita Jones anita.jones@das.state.oh.us
- Melissa Marshall mmarshall@regents.state.oh.us
- Latonya White latonya.white@mh.ohio.gov

Team R2-D2

Project Charter

Project: R2-D2 Class Project	**Date Prepared:** 20 April 2012
Project Sponsor:	Nelson Gonzalez
Project Manager:	Terence Carter, EPA
Project Customer:	Ohio Board of Regents

Project Purpose or Justification:

To gain pragmatic project management experience and fulfill the requirements of the class.

Project Description:

To create a framework for our customer's project and to develop a presentation demonstrating lessons learned.

Project Cost:

Approximately $18,000

This figure includes the total hourly wages for all team members ($171) multiplied by the number of hours they have/will work on the project (7 hours per week for 15 weeks, or 105 total hours).

Project Deliverables:

- All project documents including those for the team (R2-D2) project and those for our customer's project
- Final presentation
- Meaningful relationships

Acceptance Criteria:

- Completion of class requirements
- Development of project frameworks
- Successful completion of team presentation

Initial Risks:

- *Team Member's prior or other work-related and personal commitments*
- *Illness or unexpected emergencies causing absence or late work*
- *Unresponsive stakeholders*

Team R2-D2

Project Scope Statement

Project: R2-D2 Class Project **Date Prepared:** 23 April 2012

Product Scope Description:

- R2D2 will develop required documents on class project management in order to complete the class successfully

Project Deliverables:

- Understand requirements, define and breakdown framework
- Establish a framework, define the processes of project management and illustrate the basis of project management
- Define/Understand the needs of project management and deliver expectations
- Research and collect project information to complete the project management class
- Work together, as well as, independently to ensure project is completed by 5/24/12
- Meet each week to work on deliverables
- Create content/framework of class project management plan (Responsibilities):

Charter *(Team)*	Schedule *(Terence)*	Communications Plan *(Kelli)*
Scope *(Latonya)*	Cost Analysis *(Terence)*	Quality Plan *(Melissa)*
WBS *(Rob)*	Rick Analysis *(Terence)*	HR Plan *(Anita)*

- Post framework onto SharePoint and/or e-mail
- Create presentation for project management class and invitees
- Ensure that completed documents match project scope
- Have fun while learning project management

Project Acceptance Criteria:

- Complete Class Requirements
- Development of Frameworks
- Successful completion of presentation

Project Exclusions:

- Project team will not implement OBR framework

Project Constraints:

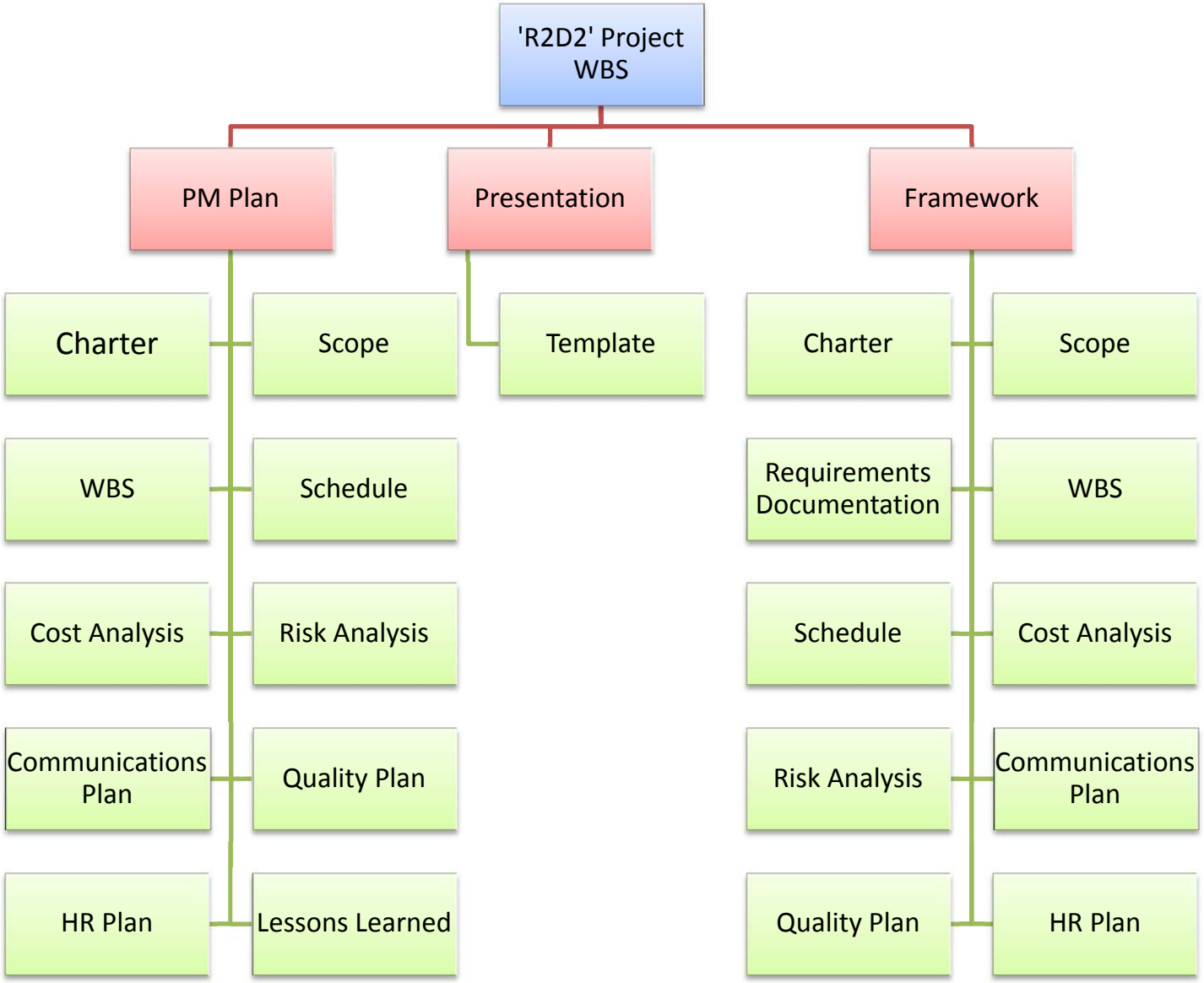
- Limited timeframe
- Prior/other commitments
- Lack of understanding
- Emergencies

Project Assumptions:

- All team members will actively participate to achieve intended goal
- Our customer will implement our project management plan/framework

Work Breakdown Structure

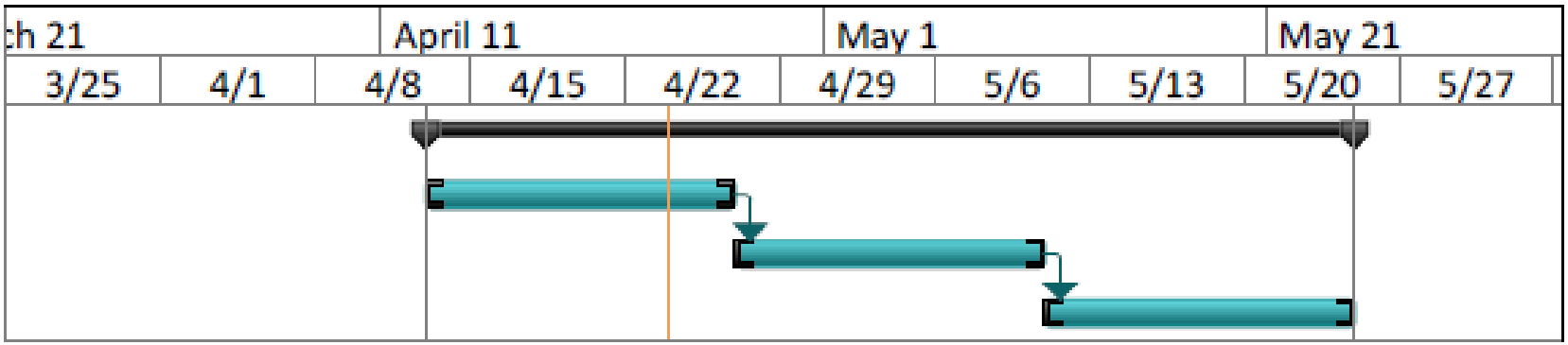
Project: R2-D2 Class Project **Date Prepared:** 20 April 2012

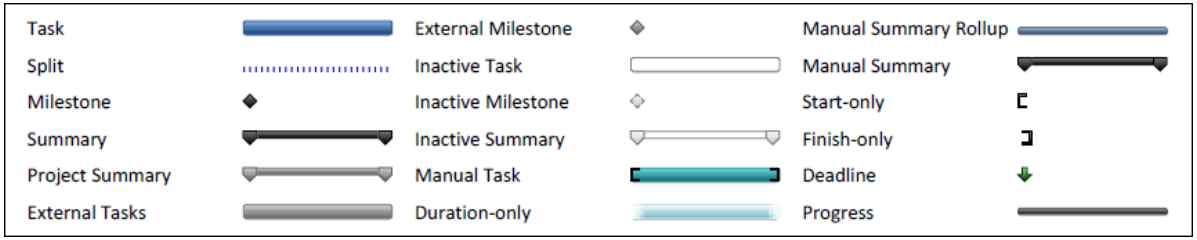


Project Schedule

Project: R2-D2 Class Project **Date Prepared:** 08 May 2012

ID		Task Name	Duration	Start	Finish
1		**R2-D2 Class Project**	**30 days**	**Fri 4/13/12**	**Thu 5/24/12**
2		Project Management	2 wks	Fri 4/13/12	Thu 4/26/12
3		Framework Product	2 wks	Fri 4/27/12	Thu 5/10/12
4		Class Presentation	2 wks	Fri 5/11/12	Thu 5/24/12





Team R2-D2

Project Cost and Risk

Project: R2-D2 Class Project	**Date Prepared:** 20 April 2012
Project Customer:	Ohio Board of Regents

Project Description:

To create a framework for our customer's project and to develop a presentation demonstrating lessons learned.

Project Cost:

Approximately $18,000

This figure includes the total hourly wages for all team members ($171) multiplied by the number of hours they have/will work on the project (7 hours per week for 15 weeks, or 105 total hours).

Project Risk:

- Team Member's prior or other work-related and personal commitments
- Illness or unexpected emergencies causing absence or late work
- Slow turnaround of work task
- Lack of understanding
- Unresponsive stakeholders

Team R2-D2

Quality Management Plan

Project: R2-D2 Class Project **Date Prepared:** 20 April 2012

Quality Roles and Responsibilities:

Role:	**Responsibilities:**
1. Document Control.	1a. Documents will be posted on SharePoint or shared via e-mail if not able to access SharePoint 1b. Keep a local copy of all documents created.
2. Document Standardization	*2.* All documents and PowerPoint presentation slides will use the same standardized template and the same template font.
3. Internal Project Reviews	3. All components will be reviewed as a team.
4. Spelling & Grammar	4. Each individual completing assigned document will be responsible for making sure spelling and grammar are correct.
5. Group Presentation	5. Each individual will be responsible for creating his/her PowerPoint slide, corresponding with the document(s) assigned. Slides will be posted to SharePoint and/or sent via e-mail. If not PowerPoint savvy, slides can be sent to Rob Feldmann, in an outline format, and Rob will add it to PowerPoint template.

Quality Assurance Approach:

Each Team R2-D2 member will be responsible for adhering to the set quality assurance guidelines.

Quality Control Approach:

Team R2-D2 members will review all documents and PowerPoint slides that are created, posted to SharePoint and/or sent via e-mail.

Quality Improvement Approach:

Whenever a Team R2-D2 member sees a problem will immediately voice their concern, regarding the quality of any documentation and/or PowerPoint slide. The proposed issue will be discussed among all Team R2-D2 members and the problem will be resolved based upon the majority – if there is a tie, the Project Manager will be the deciding decision maker.

Team R2-D2

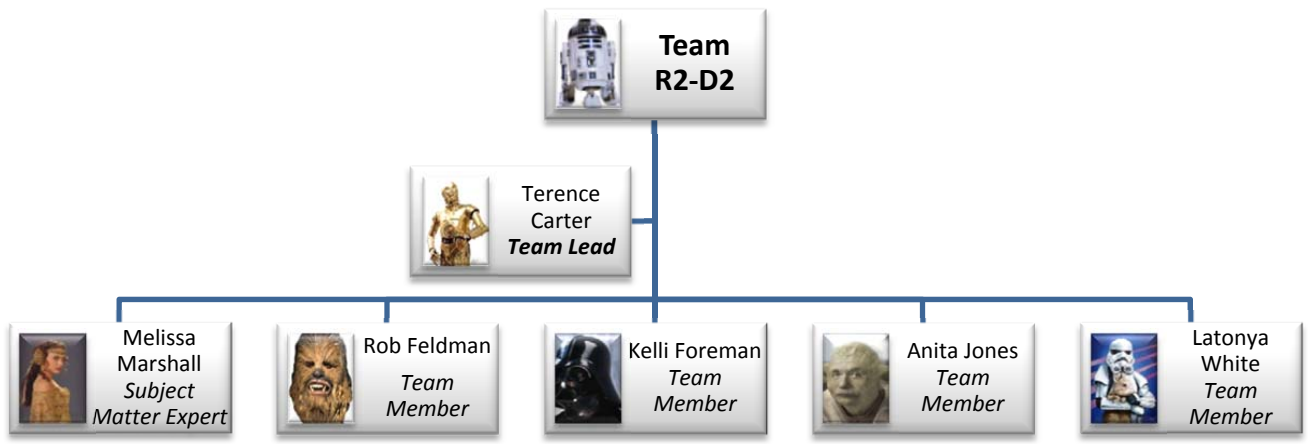
Human Resource Plan

Project: R2-D2 Class Project **Date Prepared:** 25 April 2012

Roles, Responsibilities, and Authority:

Role:	Authority:	Responsibility:
1. *Team Lead*	1. *Final Authority on split votes*	1. *Facilitate team meetings* 2. *Determines team direction and directs team towards goals*
2. *Subject Matter Expert*	2. *Authority to represent team in discussions with customer*	1. *Serves as liaison between team and customer* 2. *Conducts correspondence with customer* 3. *Researches and provides customer information, as needed.*
3. Team Member	*3. Each team member has one (1) vote on team decisions*	1. *Provide deliverables, as assigned* 2. *Participate in discussions* 3. *Scribe meeting minutes, as assigned*

Project Organizational Structure:



Staffing Management Plan

Staff Acquisition:

- *Project Team Members are a representation of a conglomerate of state agencies within the State of Ohio and are assigned upon registering for the DAS-Project Management Cohort.*
- *All team members are self-selected based on individual preferences, skill sets and interest in the subject matter.*
- *Additional subject matter experts may be consulted on a temporary basis, however do not become a part of the team roster.*

Staff Release:

- *Team members are released upon the completion of the project deliverables, including the final presentation on May 24, 2012.*
- *Unexpected emergencies may lead to team member release from team roster.*
- *Knowledge shall be transferred to the project deliverables and remain the property of DAS-Project Management Cohort.*

Resource Calendars:

- *Project team meetings are scheduled every Thursday, beginning April 5 through May 24, 2012.*
- *Unexpected absences due to illness, pre-scheduled events and/or job requirements should be noted by Team Lead.*

Training Needs:

- *Project Management Training: Eight (8) weeks beginning February 16 through March 29, 2012.*
- *Microsoft Project Training: Basic level training including understanding of processes.*
- *SharePoint Training: Basis level understanding.*

Rewards and Recognition:

- *Special Recognition: Team members may reward hard work through non-monetary methods such as certificates and/or verbal appraisal.*

Regulations, Standards, and Policy Compliance:

Team members are bound by the professional code of ethics and work procedures and policies of State of Ohio employees.

Safety:

Team member are bound by the State of Ohio safety regulations for use of equipment.

Communications Plan

Project: R2-D2 Class Project **Date Prepared:** 23 April 2012

Event	Target Audience	Description	Timing	Vehicles	Sender	Impacts
Project Core Team Meeting's Agenda and Minutes	Project Team	Agenda should include at a minimum: the invited attendees, review of assigned action items, review of the project status, and a section to cover any new assigned action items.	Meeting minutes should be uploaded and/or circulated to the core team by COB Monday after the meeting.	E-Mail and SharePoint	Designated Member of the Project Team	This will provide a means to assess the ongoing progress of the project and ensure that the team can immediately address any changes or unexpected events.
Project Core Team Meeting Communications	Project Team	Communicate and confirm all decisions or agreements made, and any action items (with the assignee established) during the Project Team meeting.	Weekly or sooner if needed.	E-Mail and SharePoint	Designated Member of the Project Team	This will provide an ongoing repository of all established agreements, suggestions or assignments, including documentation sent throughout the Project Team.
Weekly Project Status Updates	Project Team	Project's status, high level achievements and any possible risks or issues, including conflicts.	Weekly or sooner if needed.	E-Mail, SharePoint and Meetings	Designated Member of the Project Team	

Project Documents	Project Team	All Project documents to be completed and posted on the SharePoint site and shared by email from the Project Team.	NLT COB Monday before meeting dates of 4.12.2012, 4.26.2012, 5.3.2012, 5.10.2012, 5.17.2012.	E-Mail and SharePoint	Designated Member of the Project Team	This will ensure completion of set assignments and documents by the Project Team.

Definitions:

Event – trigger that causes a necessary communication.

Target Audience – who needs to know; "Who".

Description – content of the communication; "What".

Timing – the frequency of the message; "When".

Vehicles – the communication approach; "How".

Sender – the person distributing the message.

Impact – effect of the communication; goal low effort, high impact.

Lessons Learned

Project: R2-D2 Class Project **Date Prepared:** 17 May 2012

Project Performance Analysis

	What Worked Well	What Can Be Improved
Group Dynamics	Team fellowships, such as regular lunches, were a major benefit to the cohesion of the group. It aided in relationship development thereby creating the foundation for constructive debates, lively discussions and ah-ha moments.	A better understanding of the Myers Briggs personality type indicators as it pertains to teams.
	Establishing ground rules at the start of the project helped foster accountability.	Actually following the established ground rules.
Class Expectations	Knowledge gained was extraordinary. Thanks Nelson ☺	A better understanding of expectations regarding what documentation was required for the project.
Stakeholders	The opportunity to meet with a Project Management (PM) Professional who was willing to share his depth of knowledge.	Obtaining a clear understanding of the major stakeholders (e.g., PMO vs. OBR).
	The team gained a better understanding of the software development lifecycle in a real-world situation.	Proper preparation for the requirements gathering meeting.
Project Selection	Over time, projects can evolve and/or morph into different versions before completion; therefore, flexibility is very important for the success and sustainability of the team.	A more in-depth understanding of the project proposals.
Administrative Process	Nelson was available to assist the team whenever we needed a clear understanding.	Having clear and written expectations regarding team presentations.

	What Worked Well	What Can Be Improved
Administrative Process	As the team began to understand the project at-hand, they built a camaraderie that enhanced the meetings and the team effectively communicated and discussed the need(s) of the customer.	Structured meetings are essential to allow the team to stay focused as we try to identify a project plan.
Technology	Having the expertise within team members who were software developers and were able to interpret the terminology of the customer for the rest of the team.	The use of generic software terminology in the project scope, as well as, throughout the project will help the entire team as programming languages can be complex.

Additional Comments:

- The presence of an established Project Management Office (PMO) used by Ohio Board of Regents (OBR) was not anticipated, which caused confusion regarding whether our project should be geared towards OBR or the PMO.
- In the future, it would be helpful to identify the difference between high-level and low-level requirements for the project.

Board of Regents Trustee Web Database System

By Team R2D2

Ohio Department of Aging

OhioDAS

Ohio Department of Mental Health

Ohio Board of Regents

OhioEPA

Agenda

- Project Human Resources Plan
- Project Communications Plan
- OBR Project
- Project Lessons Learned
- Questions

Charter

Sponsor

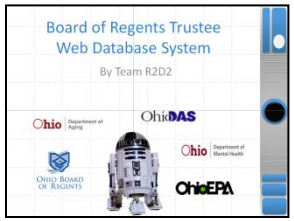
- Nelson Gonzalez

Project Manager

- Terence Carter

Customer

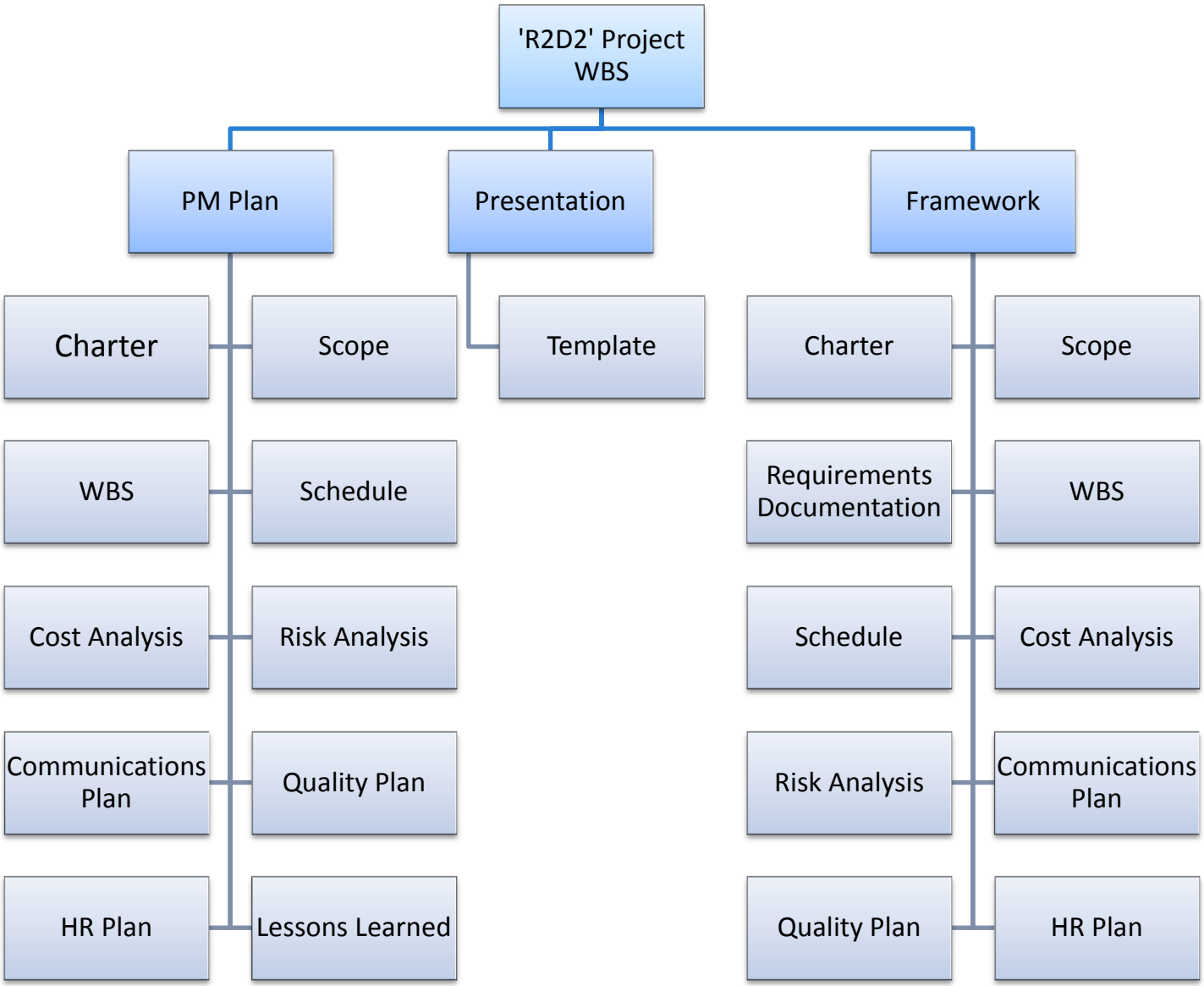
- Ohio Board of Regents



Scope

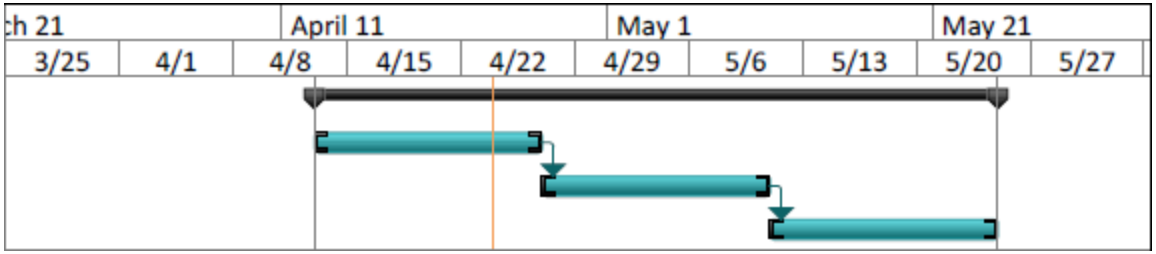
- **Description**
  - Develop required documents to complete Project Management Class
- **Deliverables**
  - Understand requirements
  - Define
  - Breakdown/establish framework
  - Research and collect information
  - Create content/framework
  - Have fun while learning
- **Criteria**
  - Complete class requirements
  - Development of frameworks
  - Presentation Completed
- **Exclusions**
  - Do not implement OBR framework
- **Constraints**
  - Limited timeframe
  - Prior commitments
  - Lack of understanding
  - Emergencies
- **Assumptions**
  - All team members participate
  - Customer will implement Team R2-D2 project management plan

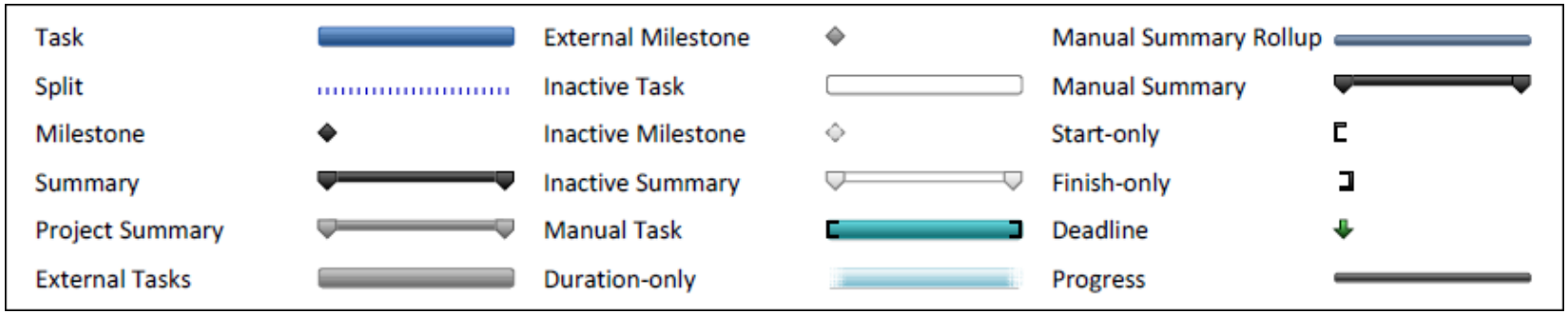
Work Breakdown Structure



Project Schedule

ID		Task Name	Duration	Start	Finish
1		**R2-D2 Class Project**	**30 days**	**Fri 4/13/12**	**Thu 5/24/12**
2		Project Management	2 wks	Fri 4/13/12	Thu 4/26/12
3		Framework Product	2 wks	Fri 4/27/12	Thu 5/10/12
4		Class Presentation	2 wks	Fri 5/11/12	Thu 5/24/12





Cost & Risk Analysis

- ★ Approximately $18,000
  - (Team Rate X Hours X Duration)

- ★ Prior or other commitments
- ★ Illness or emergencies
- ★ Slow or Unresponsive Stakeholders

Quality Plan

- **Traditional PM Quality Plan**
- **R2-D2's Quality Plan**
  - **Roles and Responsibilities**
    - Document Control & Standardization
    - Internal Project Reviews
    - Group Presentation
  - **Quality Assurance & Control Approach**
  - **Quality Improvement**

Human Resources Plan

Human Resources Plan

Roles/Responsibility/Authority

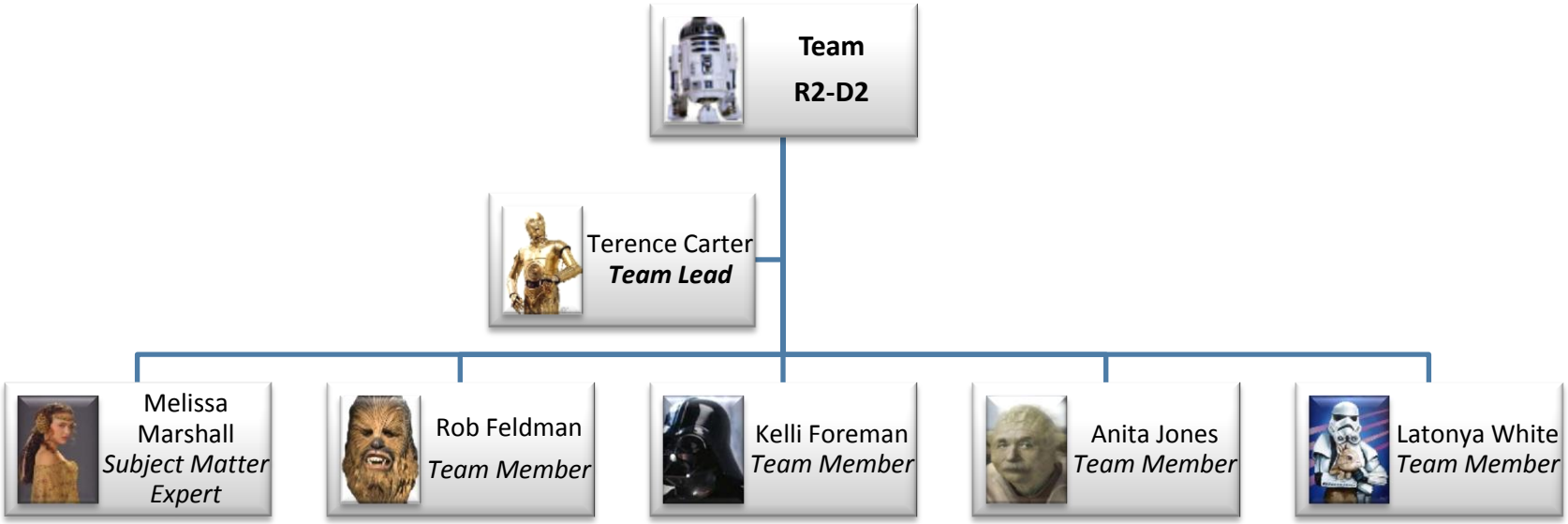
- ★ Determine the role requirements

  (Knowledge vs. Capability)

- ★ Assign responsibility to each role
- ★ Define authority levels

Human Resources Plan

Organizational Structure



Human Resources Plan

Staff Management

- ★ Acquisition
  - Establishment
  - Availability
  - Expertise
- ★ Training
  - Determination
  - Supplementation
  - Application

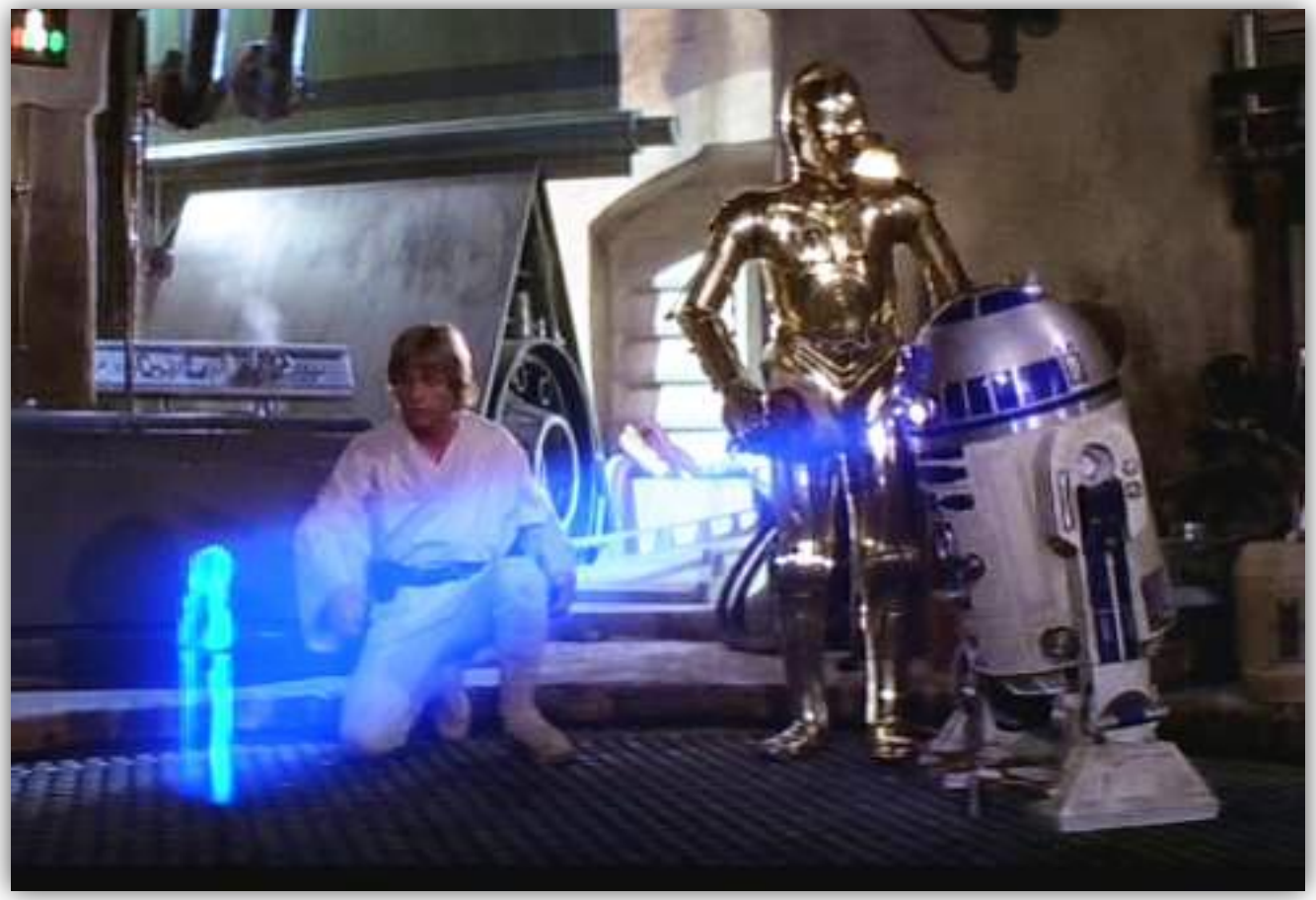
- ★ Release
  - Scheduled
  - Unexpected
  - Transfer/Replacement

Human Resources Plan

- ★ Rewards & Recognition
  - Routine
  - Impromptu

- ★ Regulations & Standards
  - Office Standards
  - Best Practices
  - Policy/Statute

Communications Plan



Princess Leia's Message

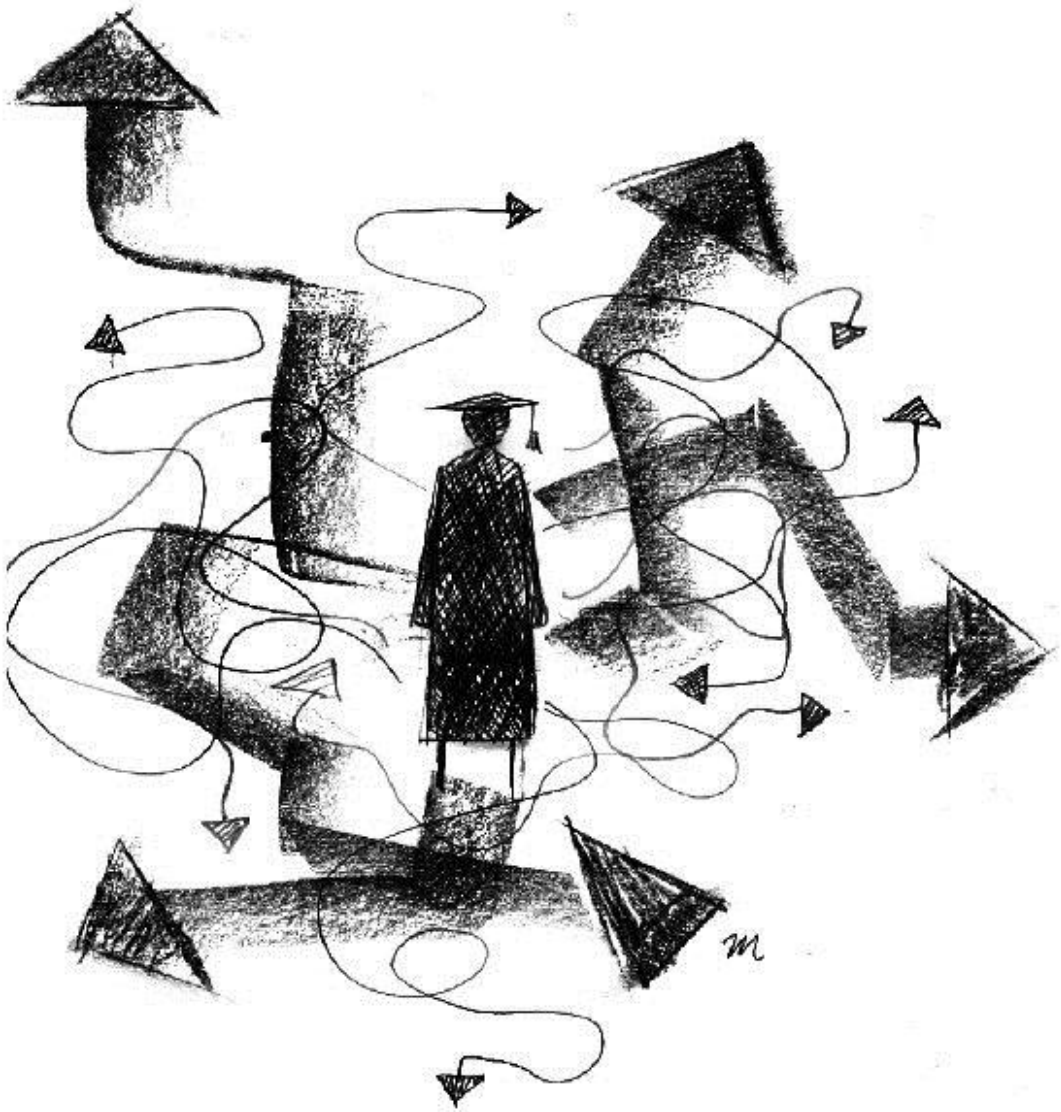
Communications Plan

- The Communication Plan provides a schedule of communications events within your project.
- What should be included:
  - Who will receive communications?
  - What format the communication will be distributed?
  - How often will communication be distributed and updated?
  - Who should send the communication?
  - Definitions list, so everyone has a common understanding of the terms.

Communications Plan

- **Event**
- **Target Audience**
- **Description**
- **Timing**
- **Vehicles**
- **Sender**
- **Impact**

Ohio Board of Regents Project



Ohio Board of Regents Project

To provide the Ohio Board of Regents with a project management plan, which includes the development of:

1) A **database** of the Trustee information, and

2) A **website** where stakeholders and the general public can view information about the Trustees.

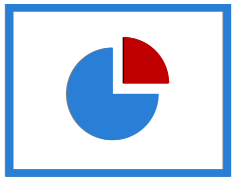
Scope

Project Requirements

Internet

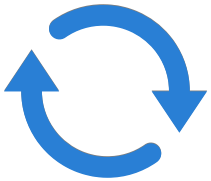
Data

Secure



Reports

Notifications



Migrate

Training

Scope

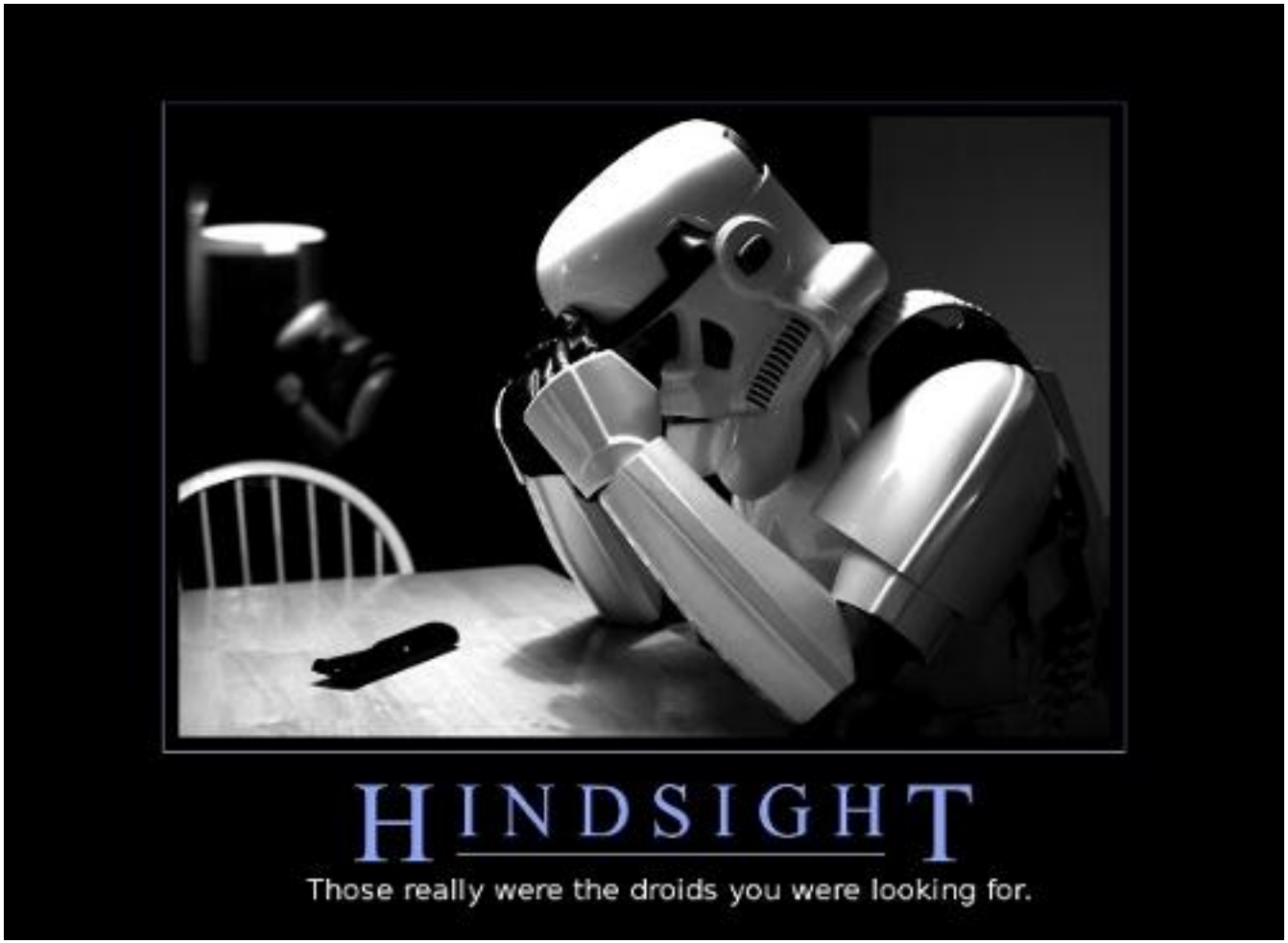
Acceptance Criteria

- ★ Reduce information inquiries by 50%
- ★ Reduce staff processing time
- ★ Improve data accuracy by 90%
- ★ Increase public accessibility

Benefits

- ★ Standardization
  - Tracking Trustees
  - Sharing Information
- ★ Single data source
- ★ Central repository
- ★ More informed public

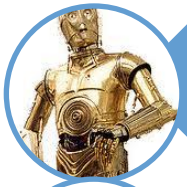
Lessons Learned



Lessons Learned

- ★ Group Dynamics
- ★ Class Expectations
- ★ Stakeholders
- ★ Project Selection
- ★ Administrative Process
- ★ Technology

Questions for: Team R2-D2



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