

Partners for Clean Streams

November 18, 2010



Project Summary

Partners for Clean Streams (PCS) is a 501(c)3 non-profit community organization with an interest in supporting local and regional water quality improvements in the metro-Toledo area. Currently, PCS is in the process of utilizing a Great Lakes Restoration Initiative (GLRI) grant to implement a stream restoration and habitat improvement project.

Project Goal

The project will be broken into two sub projects; wetland /upland habitat construction and improvement, and stream bank stabilization/restoration. The first subproject will create 10 acres of wetland habitat in Lake Sawyer and 30 acres of upland habitat improvement in the riparian corridor adjacent to Lake Sawyer and the Ottawa River. The second subproject will result in the stabilization and restoration of 1200 lineal feet of Ottawa River stream bank using a variety of methods developed by the Army Corps of Engineers. The project shall be completed in accordance with state and federal regulations.

Project Outcome

The project objective is to create 10 acres of wetland habitat, improve 30 acres of upland habitat, and stabilize and/or restore 1200 lineal feet of stream bank.

Deliverables

- *Project completed by fall of 2012*
- *10 acres of wetland habitat created*
- *30 acres of upland habitat improved*
- *1200 lineal feet of stream bank stabilized/Improved*

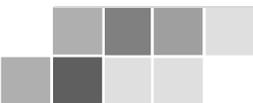
Project Benefits

This project will result in the creation of 10 acres of wetland habitat, 30 acres of upland habitat improvement, and 1200 lineal feet of stream bank stabilization/restoration.

Project Team

For more information about this project, contact team members

- Brian Patterson — Brian.Patterson@epa.state.oh.us
- Eric Herzog – Eric.Herzog@development.ohio.gov
- Nichole Northrup - Nicole.Northrup@jfs.ohio.gov
- Beverly Cooper – Beverly.Cooper@development.ohio.gov
- Melissa Hennon – Melissa.Hennon@odh.ohio.gov
- Lois Jones – loisjones2006@gmail.com
- Mentor / Coach: Nelson Gonzalez





Project Charter

Project Title and Description:

The title of this project is Partners for Clean Streams (PCS) Great Lakes Restoration Initiative (GLRI) Ottawa River habitat restoration project. The project will result in the creation of 10 acres of wetland habitat, 30 acres of upland habitat improvement, and 1200 lineal feet of stream bank stabilization.

Project Manager Assigned and Level of Authority:

Kristina Patterson will be assigned as the project manager and will be given the authority to lead the project. Mrs. Patterson will be responsible for assuring project is completed within the granted budget. She will also be responsible for developing contracts and policies associated with staff and contractor procurement. She will also have the authority to hire additional resources as needed to assist her with delivery of the completed project.

Acceptance Criteria:

Were 10 acres of wetlands created? Have 30 acres of upland habitat been improved? Have 1200 lineal feet of stem banks been stabilized? Is the project completed within budget? Are the Boy Scouts of America (BSA) satisfied with the changes to their property?

Business Case:

The project will further the goals of PCS and the Maumee RAP to eventually delist the river from the Maumee Area of Concern. This high profile project will lessen the impact of years of development by restoring and improving habitat on and adjacent to Camp Miakonda and the Ottawa River in Toledo, Ohio.

Project Cost Analysis:

The estimated budget for this project is \$ 1,365, 689.00.

Product Description / Deliverables:

The project will be broken into two sub projects; wetland /upland habitat construction and improvement, and stream bank stabilization/restoration. The first subproject will create 10 acres of wetland habitat in Lake Sawyer and 30 acres of upland habitat improvement in the riparian corridor adjacent to Lake Sawyer and the Ottawa River. The second subproject will result in the stabilization and restoration of 1200 lineal feet of Ottawa River stream bank using a variety of methods developed by the Army Corps of Engineers. The project shall be completed in accordance with state and federal regulations.

Risks and/or Assumptions:

- Project plans are completed in time to secure necessary permits prior to initiating construction.
- Permits are secured within 180 days of application.
- Weather is favorable for construction and establishment of plants.
- Maintenance of project continues beyond grant completion date.
- PCS is able to find competent staff willing to work within constraints of available funding.
- PCS is able to secure contractors within the constraints of available funding

Signed and Approved by:

Patrick Lawrence
President, Partners for Clean Streams



Scope Statement

Partners for Clean Streams Great Lakes Restoration Initiative

The scope statement is an agreement among the project team, the project sponsor and key stakeholders. It represents a common understanding of the project for the purpose of facilitating communication among the stakeholders and for setting authorities and limits for the project manager and team. The scope statement includes relating the project to business objectives, and defining the boundaries of the project in multiple dimensions including approach, deliverables, milestones, and budget.



A. Executive Summary

Partners for Clean Streams (PCS) is a 501(c)3 non-profit community organization with an interest in supporting local and regional water quality improvements in the metro-Toledo area. Currently, PCS is in the process of utilizing a Great Lakes Restoration Initiative (GLRI) grant to implement a stream restoration and habitat improvement project. This project will result in the creation of 10 acres of wetland habitat, 30 acres of upland habitat improvement, and 1200 lineal feet of stream bank stabilization/restoration. The project was selected based upon location within the Maumee Area of Concern (AOC) and ability to work cooperatively with the Boy Scouts to provide needed property improvements and educational opportunities.

B. Business Objectives

The project objective is to create 10 acres of wetland habitat, improve 30 acres of upland habitat, and stabilize and/or restore 1200 lineal feet of stream bank.

Conditions of satisfaction include:

1. Deliverables

- Project completed by fall of 2012
- 10 acres of wetland habitat created
- 30 acres of upland habitat improved
- 1200 lineal feet of stream bank stabilized/Improved

C. Project Description

1. Scope

The project is to create 10 acres of wetland habitat, improve 30 acres of upland habitat, and stabilize and/or restore 1200 lineal feet of stream bank.

Includes:

- Obtain State and Federal Permits
- Hire additional staff
- Restore 1200 lineal feet of stabilized stream bank
- 10 acres of wetland habitat created
- 30 acres of upland habitat improved
- Procurement
- Construction
- Project Closeout



Does Not Include (out of scope):

- Education opportunities and property improvements provided for Boy Scouts
- Marketing and Public Relations
- Education and Outreach
- Monitoring
- Post Project Quality Control Program

2. Completion Criteria

The project will be broken into two sub projects; wetland /upland habitat construction and improvement, and stream bank stabilization/restoration. The first subproject will create 10 acres of wetland habitat in Lake Sawyer and 30 acres of upland habitat improvement in the riparian corridor adjacent to Lake Sawyer and the Ottawa River. The second subproject will result in the stabilization and restoration of 1200 lineal feet of Ottawa River stream bank using a variety of methods developed by the Army Corps of Engineers. The project shall be completed in accordance with state and federal regulations.

3. Risk Assessment

- Project plans are completed in time to secure necessary permits prior to initiating construction.
- Permits are secured within 180 days of application.
- Weather is favorable for construction and establishment of plants.
- Maintenance of project continues beyond grant completion date.
- PCS is able to find competent staff willing to work within constraints of available funding.
- Boy Scouts Forestry Plan includes harvesting of trees
- New/additions to the Partners for Clean Streams Board of Directors

4. Constraints

All projects have constraints, and these need to be defined from the outset. Projects have resource limits in terms of people, money, time, and equipment.

Constraints for the Partners for Clean Streams Camp Miakonda project include:

- Budget
- Staffing
- Grant Restrictions



5. Dependency Linkages

Dependency for the completion of the Partners for Clean Streams, Great Lakes Restoration Initiative includes:

- Grant Approval
- State and Federal Permits are approved

6. Critical Success Factors

To ensure the quality of the products developed under the Partners for Clean Streams Great Lakes Restoration Initiative the following product acceptance criteria have been established:

- Project completed by fall of 2012
- Project completed within budget 10 acres of wetland
- 30 acres of upland habitat improved
- 1200 lineal feet of stream bank stabilized and/or restored.



10. Roles and Project Stakeholders

Roles

The following role definitions are being applied to the resources assigned to this project:

Project Sponsor	Provides executive team approval and sponsorship for the project. Has budget ownership for the project and are the major stakeholder and recipient for the project deliverables.
Project Owner	Provides policy definition to the Project team. Resolves all policy issues with the appropriate policy owners in order to provide a clear, decisive definition. Makes final decisions and resolves conflicts or issues regarding project expectations across organizational and functional areas. The project owner and the project manager have a direct link for all communication. The project manager will work directly with the project owner on all policy clarification.
Project Manager	Provides overall management to the project. Accountable for establishing a Project Charter, developing and managing the work plan, securing appropriate resources and delegating the work and insuring successful completion of the project. All project team members report to the project manager. Handles all project administrative duties, interfaces to project sponsors and owners and has overall accountability for the project.
Steering Committee	Provide assistance in resolving issues that arise beyond the project manager's jurisdiction. Monitor project progress and provide necessary tools and support when milestones are in jeopardy.
Stakeholder	Key provider of requirements and recipient of project deliverable and associated benefits. Deliverable will directly enhance the stakeholders' business processes and environment. Majority of stakeholders for this project will be agency heads, CIO's and project management representatives.
Team Member	Working project team member who analyzes, designs and ultimately improves or replaces the business processes. This includes collaborating with teams to develop high level process designs and models, understanding best practices for business processes and partnering with team members to identify appropriate opportunities, challenging the old rules of the business and stimulating creating thinking, and identifying organizational impact areas.



Stakeholders

Identify stakeholders by role.

Name	Role
PCS Board Members	Project Sponsor
Kris Patterson	Project Owner
Brian Patterson	Project Manager
Brian Hintonberger	Team Member
Dave Derrick	Team Member
Cheri Blair	Team Member
John Bolster	Team Member

Estimated Cost

Personnel / Salary	\$105,872.00
Fringe	\$12,705.00
Travel	\$0.00
Equipment	\$0.00
Supplies	\$18,300.00
Contract Costs	\$1,196,800.00
Other Costs	\$32,007.00
Total Project Costs	\$1,365,684.00



F. Project Controls

Typical project controls are Steering Committee Meetings, Monthly Status Reports, Risk Management assessment and mitigation planning and monitoring, Issue Management, Change Management, and Communication Management.

1. Risk Management

Example:

Ensure the project risks and associated mitigation actions are monitored and controlled in accordance with the Risk Management Plan

2. Issue Management

Project-related issues will be tracked, prioritized, assigned, resolved, and communicated in accordance with the Project Management Procedures:

- Issue descriptions, owners, resolution and status will be maintained on an issues database in a standard format.
- Issues will be addressed with the Project Owner and communicated in the project status report.

6. Communication Management

The following strategies have been established to promote effective communication within and about this project:

The Project Manager presents the project status to the Project Owner on a weekly basis; however, ad hoc meetings will be established at the project manager's discretion as issues or change control items arise. The project manager provides a written status report to the Project Owner on a monthly basis and distributes the project team meeting minutes. The Project Owner will be notified via email on all urgent issues. Issue notification will include time constraints, and impacts, which will identify the urgency of the request for service. The project team will have weekly update/status meetings to review completed tasks and determine current work priorities. Minutes will be produced from all meetings. The project manager will provide the project sponsors with project team minutes and steering committee status reports.



G. Authorizations

This section sets out who has authority to approve scope statement, authorize project changes, approve and accept project deliverables.

The Scope Statement will be approved by:

- The Project Manager
- The Project Owner
- The Project Sponsor

Project Changes will be approved by:

- The Project Owner

Project deliverables will be approved/accepted by:

- The Project Owner
- The Project Sponsor
- The key Stakeholders

Specific task responsibilities of project resources will be defined in the Project/work Plan.



H. Scope Statement Approval Form/Signatures

Scope Statement Approval Form

Project Name: Partners for Clean Streams, Great Lakes Restoration Initiative

Project Manager:

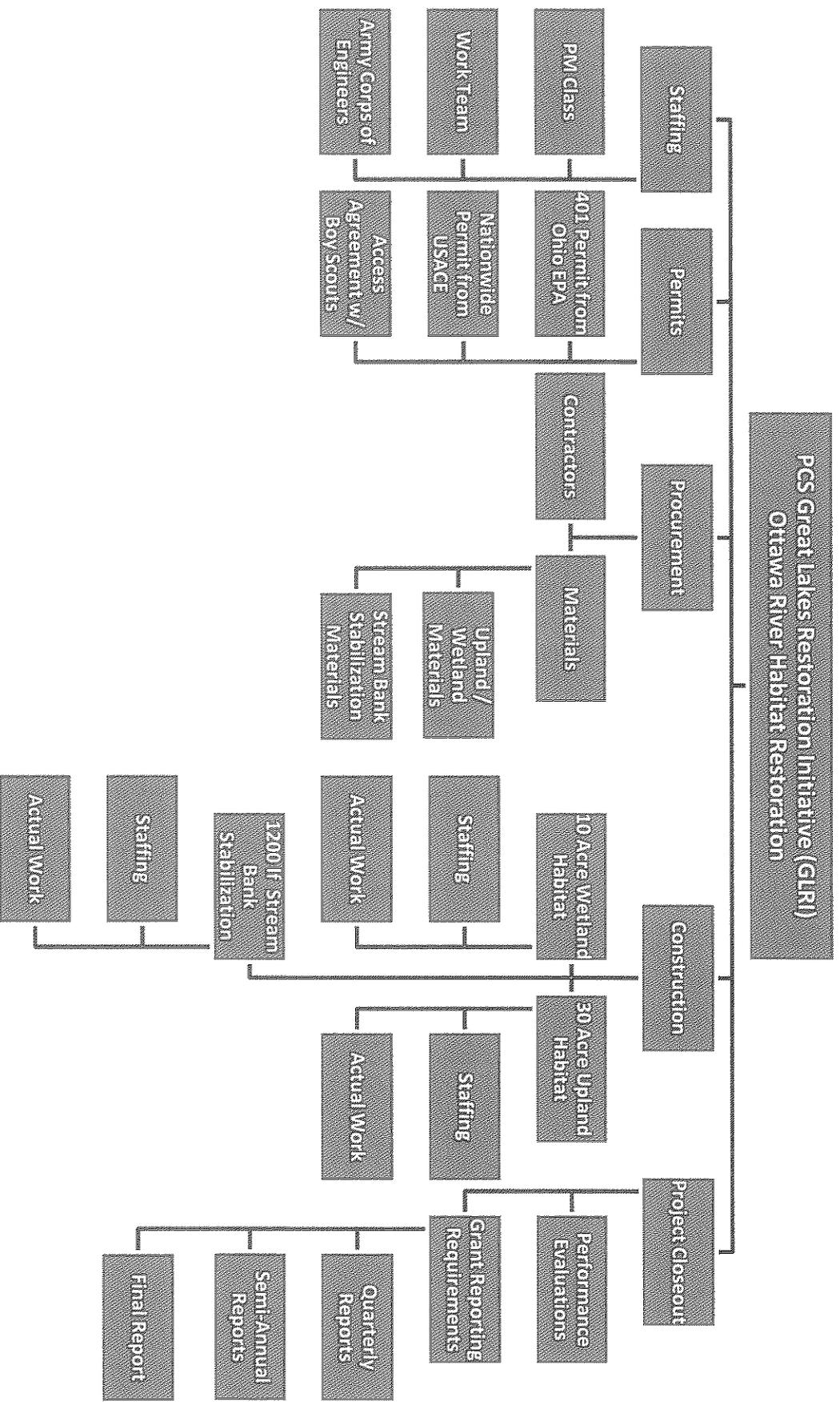
The purpose of this document is to provide a vehicle for documenting the initial planning efforts for the project. It is used to reach a satisfactory level of mutual agreement between the project manager and the project sponsors on the objectives and scope of the project before significant resources are committed and expenses incurred.

I have reviewed the information contained in this Scope Statement and agree.

Name	Signature	Date
Kris Patterson		
Brian Patterson		

The signatures of the people above relay an understanding in the purpose and content of this document by those signing it. By signing this document you agree to this as the formal Project Scope Statement.

Work Breakdown Structure



ID	Task Name	Duration	Start	Finish	Quarter	4th Quarter			1st Quarter			2nd Quarter			3rd Quarter			4th Quarter			1st Quarter			2nd Quarter			3rd Quarter			4th Quarter			1st Quarter			2nd Quarter		
					Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
1	PCS Great Lakes Restoration Initiative (GLRI) Ottawa River Habitat Restoration Project	654 days?	Tue 9/28/10	Sat 3/30/13																																		
2	Staffing	265 days	Tue 9/28/10	Sat 10/1/11																																		
3	PM Class	31 days	Tue 9/28/10	Tue 11/9/10																																		
4	Work Team (PCS Staff)																																					
5	Watershed Coordinator	45 days	Mon 11/1/10	Fri 12/31/10																																		
6	PCS GLRI Project Management Team																																					
7	Army Corps of Engineers (ACE) Team	265 days	Tue 9/28/10	Sat 10/1/11																																		
						Brian Hinterberger																																
8	Permits/Agreements	152 days	Fri 10/1/10	Sat 4/30/11																																		
9	401 Permit from Ohio EPA	131 days	Mon 11/1/10	Sat 4/30/11																																		
10	Nationwide Permit from USACE	131 days	Mon 11/1/10	Sat 4/30/11																																		
11	USACE Field Visit	1 day	Wed 11/10/10	Wed 11/10/10																																		
12	PCS Access Agreement with Boy Scouts	66 days	Fri 10/1/10	Fri 12/31/10																																		

Project: PCS Project Date: Tue 11/9/10	Task		External Tasks		Manual Task		Finish-only	
	Split		External Milestone		Duration-only		Deadline	
	Milestone		Inactive Task		Manual Summary Rollup		Progress	
	Summary		Inactive Milestone		Manual Summary			
	Project Summary		Inactive Summary		Start-only			



Request for Proposal

Partners for Clean Streams (PCS) Great Lakes Restoration Initiative (GLRI) Ottawa River Habitat Restoration Project

Organizational Overview

Partners for Clean Streams (PCS) is a non-profit organization dedicated to habitat and wildlife protection and restoration. Our current project entails restoring at least 10 acres of wetland, 30 acres of associated upland habitat, and 1200 linear feet of sediment erosion and bank stabilization. There is a separate RFP for each section of this project, however, it is expected that all three sections are worked on at the same time.

Target Audience

Contractors and suppliers

Required Deliverables

Complete project requirements, within the allotted time and at or less than the budgeted cost, which includes time and materials. In addition, during construction and at completion, ensure the following goals/actions are met.

- 1). Follow the Army Corp of Engineer design/build plans and be prepared to work closely with ACE during the project.
- 2). Follow Maumee Area of Concern Stage 2 Watershed Restoration plan.
<http://www.PartnerForCleanStreams.org/State2.html>
- 3). Follow the Lake Erie Protection and Restoration Plan.
<http://www.lakeerie.ohio.gov/Portals/0/Reports/2008LEPRplan.pdf>
- 4). Follow the Lake Erie Lakewide Management Plan (LaMP) <http://www.epa.gov/glnpo/lakeerie/>
- 5). State of Ohio Deslisting Document
http://www.epa.state.oh.us/portals/35/rap/DelistingTargetsOhioAOC_2008Revision.pdf

Assumptions and Agreements

- The project must be completed by _____.
- A preliminary budget for this project has been approved.
- Bids may not exceed \$_____. This price includes time and materials.
- ALL task/job/policy data will be current and approved as such by management.
- ALL technical illustrations, drawings, and schematics to be included.
- There will be no significant changes to the task/job/policy data during the project.
- At the conclusion of the project, all materials developed by the project team will become the exclusive property of _____. In addition, any and all work sheets and other working documentation will also become the property of _____.
- Billing for services and products completed will be submitted _____.



Required Proposal Format

The proposal must contain a (1) Technical section and (2) a Time-Cost section.

Technical Proposal

In the Technical section, the vendor should include time-lines, projected required personnel, and schedules for completing the project.

Time-Cost

In the Time-Cost section, the vendor must detail the time and costs that will be required to complete the project.

Additional Documentation

Vendors must include a short demo or direct us to an internet site which demonstrates their production capabilities.

Request for References

Submission Deadline

Month Day, Year

Submit Proposal To:

Partners for Clean Streams, Inc.

For Additional Information or Clarification, Contact:

Kris Patterson, Executive Director, P.O. Box 203
Perrysburg, Ohio 43552
Telephone: (419) 874-0727

Basis for Award of Contract

Lowest Bid

Award Date

Month Day, Year

Partners for Clean Streams Great Lakes Restoration Initiative (PCS GLRI)

Risk Assessment

Permits must be secured prior to beginning construction on the Partners for Clean Streams project. If the permits are not secured on time the PCS project manager must work with the selected contractors to adjust timing of the project to ensure timely completion. The project timeline may also need to be adjusted according to the weather conditions. To ensure that the Boy Scouts' Forestry Plan includes the harvesting of trees, PCS must develop an access agreement and a memorandum of understanding with the Boy Scouts.

PROBABILITY AND IMPACT MATRIX			
RISK	PROBABILITY OF OCCURRENCE (1-5)	IMPACT OF RISK (1-5)	Risk Level (1-25)
Project plans are not completed in time to secure necessary permits prior to initiating construction	1	5	5
Permits are not secured on time	2	5	10
Weather is not favorable for construction and establishment of plants	3	4	12
Maintenance of project continues beyond grant completion date	2	3	6
PCS is not able to find competent staff willing to work within constraints of available funding	2	4	8
PCS is not able to secure contractors within the constraints of available funding	2	4	8
Boy Scouts Forestry Plan does not include harvesting of trees	1	4	4
New/additions to the Partners for Clean Streams Board of Directors	1	2	2

Probability

5 = High; 3-4 = Medium; 1-2 = Low

RISK	PLAN
Project plans are not completed in time to secure necessary permits prior to initiating construction	Work with the Army Corp of Engineers to ensure that the engineering studies and design/build plans are in place in time to acquire necessary permits
Permits are not secured on time	Work with contractors to adjust timing of the project to ensure timely completion
Weather is not favorable for construction and establishment of plants	Adjust the project timeline and plans to meet weather conditions
Maintenance of project continues beyond grant completion date	Develop a memorandum of understanding with the Boy Scouts
PCS is not able to find competent staff willing to work within constraints of available funding	Extend the timeline to continue search for appropriate staff
PCS is not able to secure contractors within the constraints of available funding	Extend the bid deadline to continue search
Boy Scouts Forestry Plan does not include harvesting of trees	Develop an access agreement and a memorandum of understanding that includes the harvesting of trees
New/additions to the Partners for Clean Streams Board of Directors	Begin recruitment of 3 new board members to replace outgoing members in a timely manner

Partners for Clean Streams Great Lakes Restoration Initiative
 Ottawa River Habitat Restoration Project (PCS GLRI)
 Communications Plan

Category	Sub-Category	Event	Target Audience	Message Objective	Timing	Vehicles	Sender	Feedback Mechanism	Impact
Staffing	Hire Watershed Coordinator	Coordinate w/Board	Board Members		Completed before 11/9				
Staffing	Hire Watershed Coordinator	Creation/Approval of Job Description	Board Members		Completed before 11/9				
Staffing	Hire Watershed Coordinator	Advertise Position	Pool of Candidates		Week of 10/25/2010		K. Patterson		
Staffing	Hire Watershed Coordinator	Receive applications	PCS	Applicants responding to posting	Closing approx. 11/05/2010	Mail or email	Interested applicants	None planned; will respond to calls/emails asking about receipt.	Create pool of likely candidates.
Staffing	Hire Watershed Coordinator	Review/Rank Applicants	K. Patterson; one board member	Collect information to identify/prioritize applicant qualifications	Approx. 11/10/2010	Face-to-face meeting	K. Patterson; one board member	Discussion; review of criteria, interview notes	Narrow pool to most qualified candidates
Staffing	Hire Watershed Coordinator	Contact Applicants for Interviews	Selected applicants	Schedule Interview	11/10 and 12/2010	Phone, email	K. Patterson	Phone, email	Move hiring process forward
Staffing	Hire Watershed Coordinator	Conduct Interviews	Selected applicants	Determine which is best suited candidate	Week of 11/15/2010	Face-to-face interview	K. Patterson; a board member	Interview, follow-up correspondence	PCS and applicants obtain more complete information
Staffing	Hire Watershed Coordinator	Select candidate/Make offer	Likely WS Coordinator	Reach tentative agreement	11/22/2010	Phone conversations, possible face-to-face meeting	K. Patterson; a board member; full board to approve	Discussions during board meeting	Move hiring process forward
Staffing	Hire Watershed Coordinator	Agree to terms/Hire Candidate	Selected candidate	Reach final agreement	By 12/06/2010	Phone conversations, possible face-to-face meeting	K. Patterson	Discussion, offer and acceptance letters.	Finalize hiring
Staffing	Hire Watershed Coordinator	Begin Hiring/Orientation process	Watershed Coordinator	Provide required HR information and information for new employee to begin duties	By 12/27/2010	On-the-job training	K. Patterson	Questions to K. Patterson	Fully staffed by start of grant period (01/01/2011)
Staffing	Hire Watershed Coordinator	Contact unsuccessful candidates	Unsuccessful applicants	Thank them for interest and notify them that the job has been filled	1/2/2011	Letters from K. Patterson	Office Administrator	N/A	End hiring process

Staffing	USACE	Determine how USACE will participate and obtain names, contact information	USACE via Dave Derrick and Brian Hintonberger	Gather information	09/28/2010 through 10/01/2011	Face-to-face discussion; phone and email correspondence	Face-to-face discussion; phone and email correspondence	PCS will have the information to maintain good communications with USACE throughout the project
Staffing	PCS PM Team	Organize PCS PM Team	Potential members of the team	Request that individuals serve as a member of the PCS PM team	10/15/2010 to be completed no later than 12/31/2010	Emails to offer explanation and make initial request followed by phone call to confirm	Email or phone call	PM* Team from multiple disciplines in place to help oversee project

*NOTE: Likely members to join K. Patterson on this team are other PCS staff, some of the PCS board members, staff from local universities and the City of Toledo or other local jurisdictions.

Category	Sub-Category	Event	Target Audience	Message Objective	Timing	Vehicles	Sender	Feedback Mechanism	Impact
Permits/Agreements	Access Agreement/MOA	Discussions among legal representatives	PCS/Boy Scouts	Negotiate access agreement/MOA	10/1/2010 through 04/30/2011	Discussions/draft documents	PCS/Boy Scouts Legal Advisors	Discussions/draft documents	Negotiations
Permits/Agreements	Access Agreement/MOA	Agreement? MOA completed	PCS/Boy Scouts	Final access agreement/MOA	4/30/2011	Signed agreement/MOA	PCS Board/Boy Scout Board	N/A - possible addendums in the future	Agreement/MOA on file/planning and construction can proceed
Permits/Agreements	Access Agreement/MOA				by 12/31/2010	Final meeting to sign agreement	PCS/Boy scout representative	Signed agreement/MOA on file	File for the record; will guide construction activities
Permits/Agreements	401/404	Meeting w/ ACE	PCS	Guidance	Planned for 11/9-10/2010	Site visit	ACE staff	Q&A during visit	Permitting process can begin
Permits/Agreements		Compile data/complete/submit 401 to 401 application	Ohio EPA	Compliance w/ permit requirements	begin 11/10/2010; submit by 01/15/2010	Application Form	PCS Staff	OEPA comments	Request for permit
Permits/Agreements		Compile data/complete/submit 404 to 404 application	USEPA	Compliance w/ permit requirements	begin 11/10/2010; submit by 01/15/2010	Application Form	PCS Staff	USEPA comments	Request for permit
Permits/Agreements		Maintain communications w/ Ohio EPA	Ohio EPA	Maintain quality of application	on-going until permit is received	Phone, email	PCS Staff	Phone, email, mail	Improved application
Permits/Agreements		Maintain communications w/ USACE	USEPA	Maintain quality of application	on-going until permit is received	Phone, email	PCS Staff	Phone, email, mail	Improved application
Permits/Agreements		Receive 401 Permit	PCS	Permit granted	4/30/2011	Mail	Ohio EPA	N/A	Filed for the record; construction can begin
Permits/Agreements		Receive 404 Permit	PCS	Permit granted	4/30/2011	Mail	USACE	N/A	Filed for the record; construction can begin

Partners for Clean Streams Great Lakes Restoration Initiative
 Ottawa River Habitat Restoration Project (PCS GLRI)
 Communications Plan

Category	Sub-Category	Event	Target Audience	Message Objective	Timing	Vehicles	Sender	Feedback Mechanism	Impact
Procurement	Consolidated Project	Meet w/ plant and other experts							
Procurement	Consolidated Project	Develop RFP and review criteria	Pool of likely contractors	Thoroughly explain project expectations	01/15/2011 - 02/01/2011	Create drafts; meetings w/ K. Patterson and the PM Team	PCS PM Team	Discussions, phone, email, and face-to-face questions	
Procurement	Consolidated Project	Open RFP	Pool of likely contractors	Open bidding process	2/15/2011	?	K. Patterson	Bids received	
Procurement	Consolidated Project	Hold Bidders' Conference	Pool of likely contractors	On-site field visit and opportunity for questions	3/15/2011	Field day on construction site	PCS PM Team	Q/A during the day	
Procurement	Consolidated Project	Receive bids	PCS	Identify interested contractors	4/1/2011	Mail of delivery service to PCS	Interested contractors	N/A	
Procurement	Consolidated Project	Rate bids	Pool of likely contractors and for the record	Review and rate contractor qualifications	04/02/2011 - 05/10/2011	Meetings of K. Patterson and PM Team	K. Patterson and PM Team	Discussion during meetings; calls to clarify information as needed	
Procurement	Consolidated Project	Board Approval	PCS organization and all bidders	Inform board and received approval as required by organizational procedure	5/12/2011	Board Meeting	PCS Board	Vote/Minutes	Approval of contractor
Procurement	Consolidated Project	Contact winning bidder and complete final negotiations	Selected contractor	Open negotiation process	5/15/2011	Phone call and follow-up written offer	K. Patterson	Phone, email, written questions; negotiations process	Negotiations toward final contract
Procurement	Consolidated Project	Sign contracts	PCS and selected contractor	Close negotiation process	6/1/2011	Meeting	K. Patterson, Board President and Contractor	N/A	Contract finalized
Procurement	Consolidated Project	Notify unsuccessful bidders	Unsuccessful bidders	Thanks for interest; another contractor has been selected	6/2/2011	Letter	Office Administrator	N/A	Close out bidding period

Partners for Clean Streams Great Lakes Restoration Initiative
 Ottawa River Habitat Restoration Project (PCS GLRI)
 Communications Plan

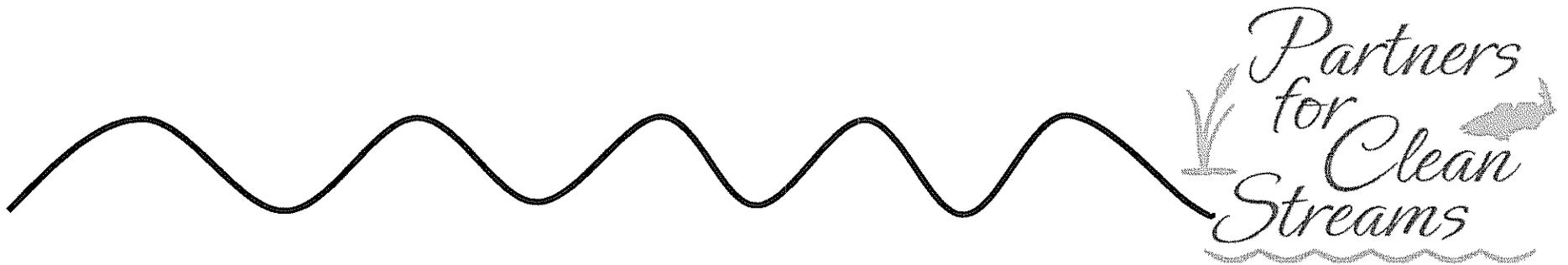
Category	Sub-Category	Event	Target Audience	Message Objective	Timing	Vehicles	Sender	Feedback Mechanism	Impact
Construction	Consolidated Project	Hire/ID Construction manager	Construction Manager	Initiate agreement	7/15/2011	Signed contract	PCS/Construction Manager	negotiations up to signatures	Ready to begin construction
Construction	Consolidated Project	Meet w/ CM	Construction Manager	Open communications	7/29/2011	Phone	K. Patterson	Face-to-face meeting	Expectations clear, questions answered
Construction	Consolidated Project	Construction Begins	PCS, K. Patterson	Construction reporting begins	9/1/2011	Established Reporting Process	Construction Manager	N/A	Project on schedule, underway
Construction	Consolidated Project	Monitor Construction	PCS, K. Patterson	Maintain communications; notes and address problems	9/01 through 10/31/2011	Established Reporting Process	Construction Manager	Change request process	Quality control
Construction	Consolidated Project	Discharge contractor	Construction Manager	CM to hand off responsibilities	10/31/2011	Established Reporting Process	K. Patterson	Completed punch sheet	Project Closeout
Project Closeout	Grant Reporting	Quarterly Report	USEPA	Activity report for 3 preceding months	Quarterly from 01/01/2011 through 12/31/2012	USEAP Electronic Reporting System	K. Patterson	Response from USEPA	Meet grant requirements; prepare for semiannual reports
Project Closeout	Grant Reporting	Semi annual Report	USEPA	Activity report for 6 preceding months, higher level of detail	Every six months from 01/01/2011 through 12/31/2012	USEAP Reporting System	K. Patterson	Response from USEPA	Meet grant requirements; prepare for final report
Project Closeout	Grant Reporting	**Draft Final Report	USEPA	Draft activity report for complete project	Plan to complete by 11/15/2012.	USEAP Reporting System	K. Patterson	Response from USEPA	Meet grant requirements; document project
Project Closeout	Grant Reporting	Final Report	USEPA	Final activity report for complete project	Plan to complete by 12/31/2012	USEAP Electronic Reporting System	K. Patterson	Response from USEPA	Meet grant requirements; document project
Project Closeout	Grant Reporting	Determine need to Request Project Extension	USEPA	If needed, prepare request for project extension	at least 14 days prior to end of grant award (12/17/2012)	PCS	K. Patterson	Response from USEPA	Go/No go decision for grant extension request

***Technically, draft is due 02/14/2013 and final report is due by 03/31/2013.

***Plan to complete early so staff time on reports can be charged to grant.

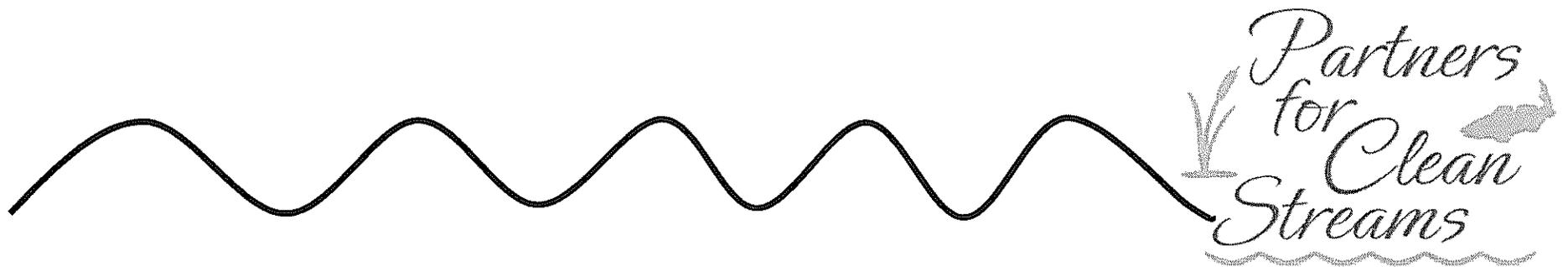
Partners for Clean Streams

Project Management Documents



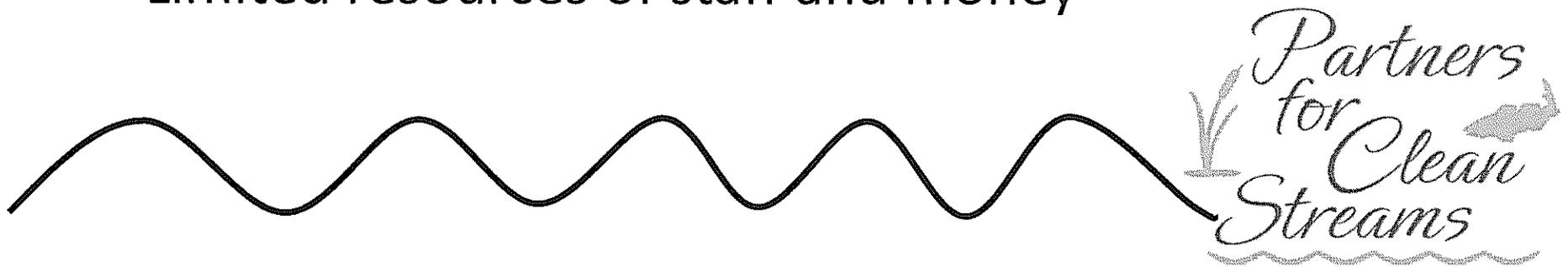
Team Members

- Brian Patterson
- Eric Herzog
- Nichole Northrup
- Beverly Cooper
- Lois Jones
- Melissa Hennon



Business Case

- Partners for Clean Streams is a 501(C)3 nonprofit community organization
- PCS recently awarded a Great Lakes Restoration Initiative (GLRI) Grant from the United States Environmental Protection Agency
- Limited resources of staff and money

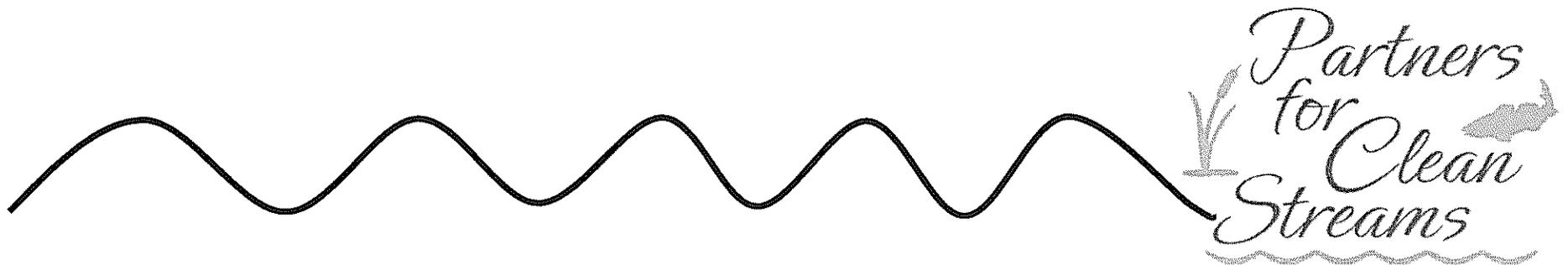




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Scope Statement

- "A comprehensive scope statement is a key document that binds you, your project team, the project sponsor, and the customer. It is an agreement that defines the work of the project and the customer's business objectives. A comprehensive scope is a document that ensures that the project includes all the work required and only the work required, to complete the project successfully."



Partners for Clean Streams, Project Management Documents

A. Executive Summary

This project is titled Partners for Clean Streams (PCS) project management documents. The project will result in the creation of project management documents to assist PCS with the implementation of a stream restoration and habitat improvement project.

B. Business Objectives

1. Business Need/Opportunity/Objectives

- The project will fulfill our class requirement and the Team's desire to help PCS by generating project management documents to assist with the implementation of a stream restoration and habitat improvement project.

2. Product Description (Solution)

- The project will result in the creation of a project statement of work (SOW), charter, project management plan, work breakdown structure, project schedule, and project communications plan, and a project procurement plan.

C. Project Description

1. Scope

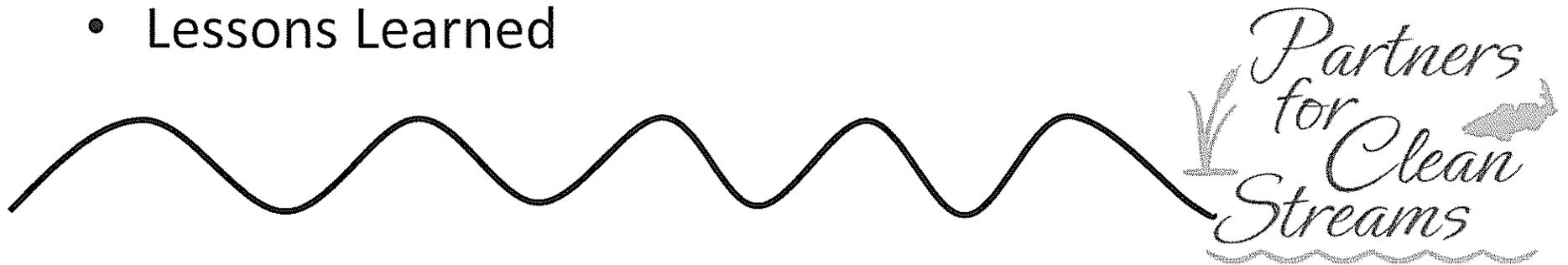
- The project will commence on September 28, 2010 and be completed by November 9, 2010. Work will include the creation of a project statement of work (SOW), charter, project management plan, work breakdown structure, project schedule, project communications plan, and a project procurement plan.

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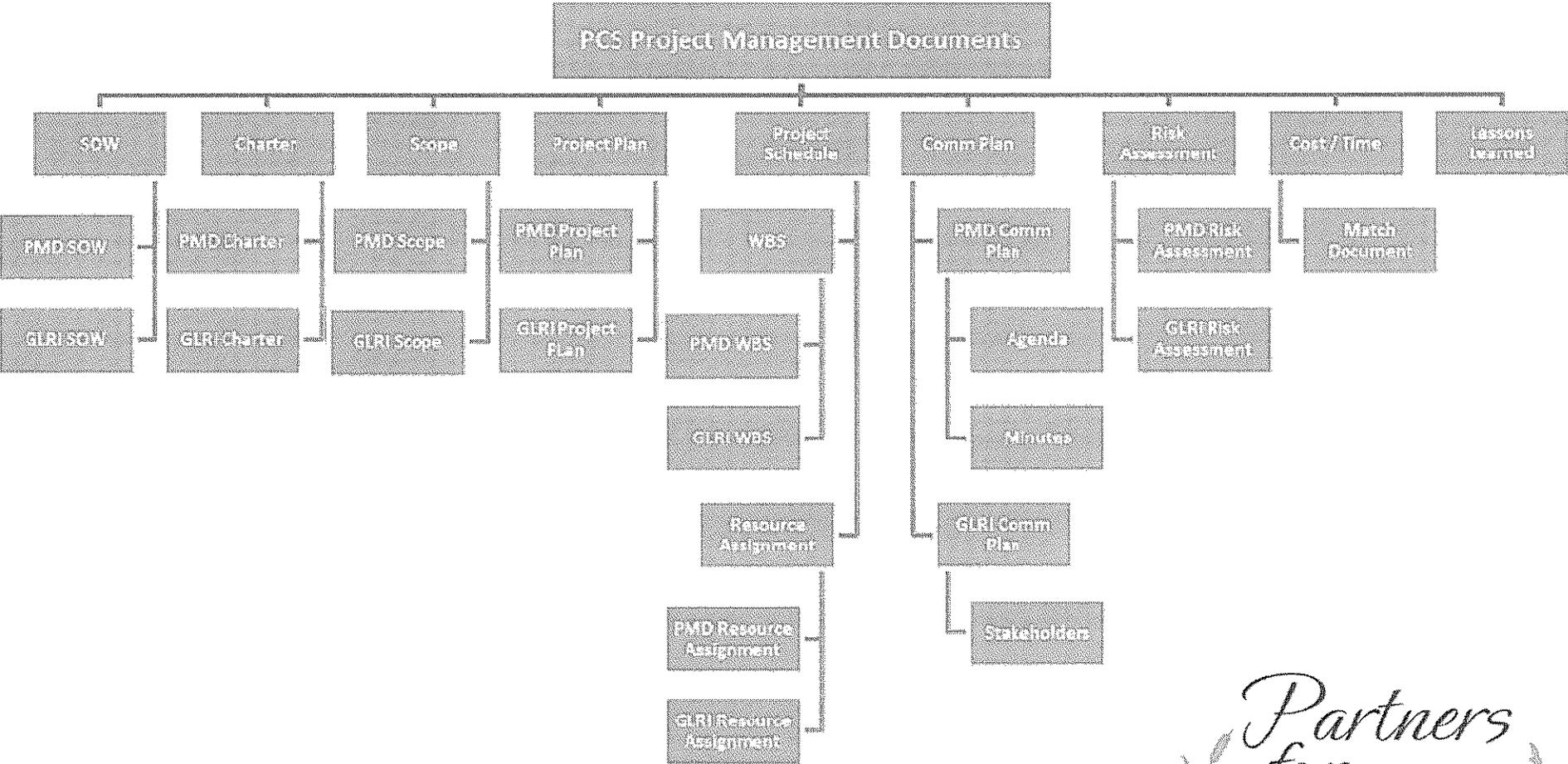


Scope Deliverables

- Scope Statement
- Statement of Work
- Project Charter
- Project Schedule
- Communications Plan
- Risk Assessment
- Cost Assessment
- Lessons Learned



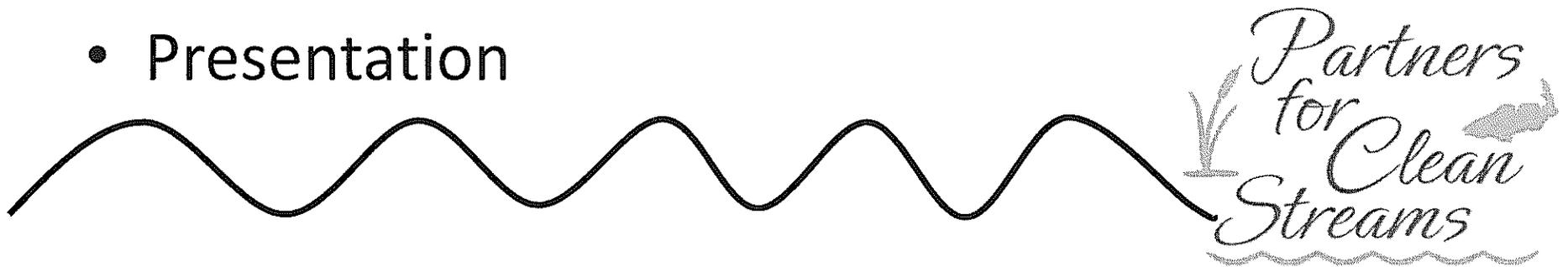
Work Breakdown Structure



Project Schedule

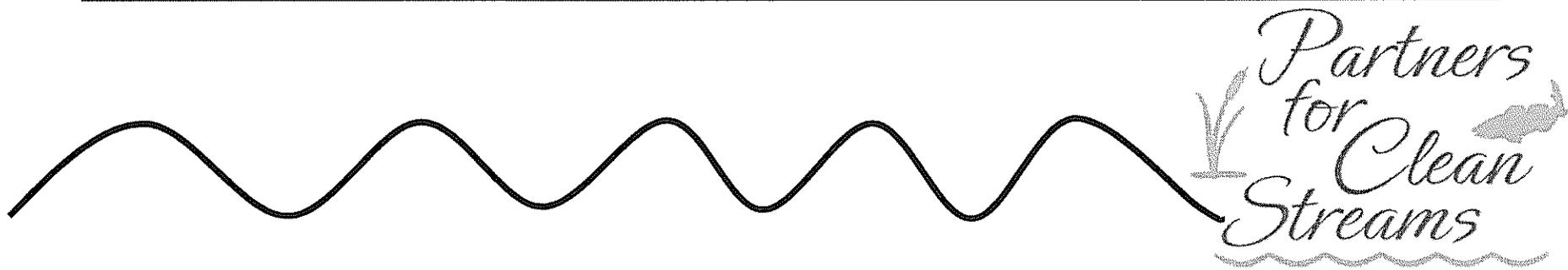
Major Milestones:

- Initial Team Meeting
- Resource Assignment
- Schedule
- Task Deadlines Set
- Conference Call
- Dry Run
- Presentation



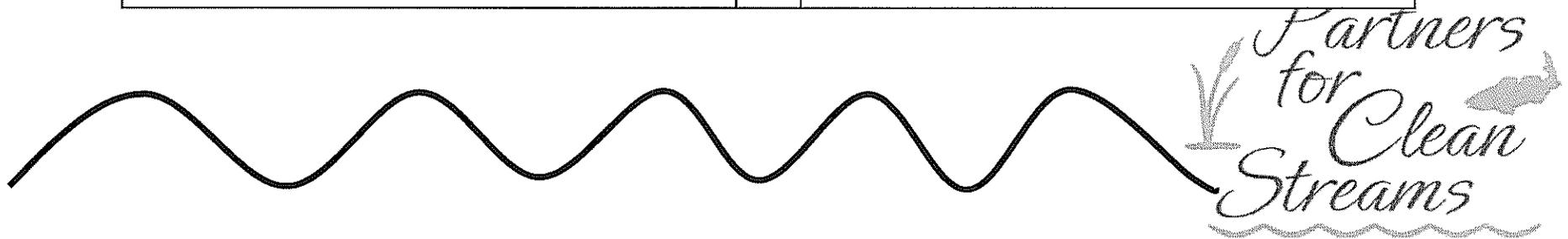
Communications Plan

Event	Target Audience	Message Objective	Timing	Vehicles	Sender	Feedback Mechanism	Impact
Provide Meeting Agenda	PCS PMD Team and Nelson	Structure, plan for next meeting	At least one day prior to meeting	email/Windows Live after 10/19/2011	B. Patterson	Phone/email/Windows Live after 10/19/2011	Additions/corrections to agenda
Provide Meeting Notes	PCS PMD Team and Nelson	Document project activities, progress; provide information about next meeting time, location, highlights	W/in 3 days following meeting	email/Windows Live after 10/19/2011	B. Cooper	Phone/email/Windows Live after 10/19/2011	Corrections of the project records; capture final record
Discussion, critique, suggestions	PCS PMD Team	Gauge project progress, monitor for scope creep	At least once during each class though 11/02	face-to-face discussions during class hours	N. Gonzalez (Marsha as alternate)	Question/comments during discussion	Receive feedback/suggestions from NG; course correction
Questions/progress updates	PCS PMD Team	Gauge project progress, monitor for scope creep	As needed	phone/email, discussion/via Windows Live site after 10/19/2011	among PCS PMD Team Members	Person-to-person or face-to-face in group meetings; phone, conference call/email/at Windows Live site after 10/19/2011	Maintain team communications, receive feedback/suggestions relayed from NG; course correction
Questions/progress updates	PCS	Collect information, feedback/suggestions from K. Patterson; course correction	At least once during the course of the project (11/0/19/2011) and then as needed through 11/02	Conference call	Arranged by B. Patterson, all team members to participate	Discussion during call, email or phone follow-up	Receive information, receive feedback/suggestions from KP; course correction
Collect information for Time Reporting	PCS PMD Team	Collect time records for/from each team member	Weekly if possible, to be concluded by 11/08/2011	In-person, phone, email, Live Website	B. Cooper	Person-to-person or face-to-face in group meetings; phone, email/at Windows Live site after 10/19/2011	Data to be compiled for PCS in-kind documentation/PM D budget section
Final Time Reporting	PCS - Kris Patterson	Provide letters and spreadsheet to document team member hours	Completed on 11/09/2010	One documentation letter signed by each team member and final spreadsheet	B.Cooper to Team Members; Team Members to B. Patterson to K. Patterson	N/A	PCS will hold for possible use as in-kind match
Project Presentation	PM Class, Instructor, Audience	Demonstrate understanding of class content, ability to implement what we have learned	On 11/09/2010	Provide PowerPoint presentation and panel discussion following 11/2/1010 run-through	PCS PMD Team Members	Q&A at the end of the presentation	Completion of class requirements; demonstration of what the team has learned.



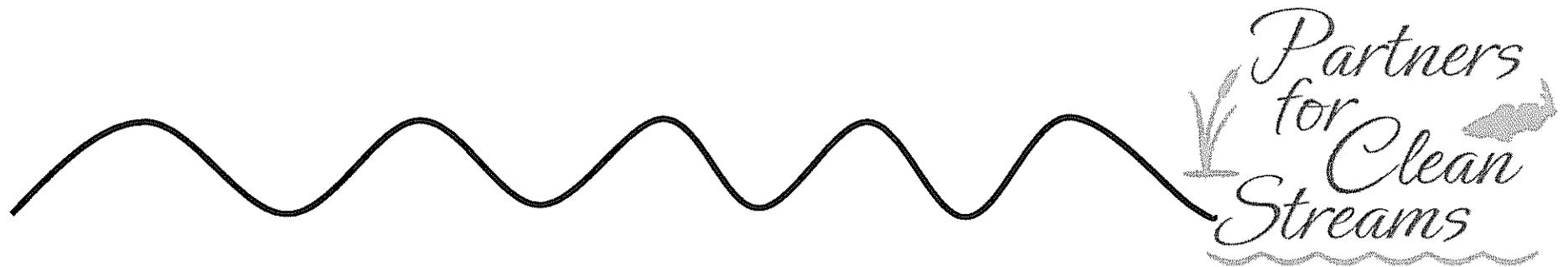
Communications Plan Events/Vehicles

EVENTS	VEHICLES
<ul style="list-style-type: none"> • Provide meeting agendas and minutes 	<ul style="list-style-type: none"> • Email; after 10/19, MS Live
<ul style="list-style-type: none"> • Collect information (PCS documents, presentation drafts, hours spent on project) 	<ul style="list-style-type: none"> • In-class meetings, email, phone, MS Live, minutes
<ul style="list-style-type: none"> • Discussion, critique, suggestions 	<ul style="list-style-type: none"> • In-class meetings, conference calls, email, MS Live
<ul style="list-style-type: none"> • Questions, progress updates 	<ul style="list-style-type: none"> • In-class meetings, email, phone, MS Live, minutes, conference calls



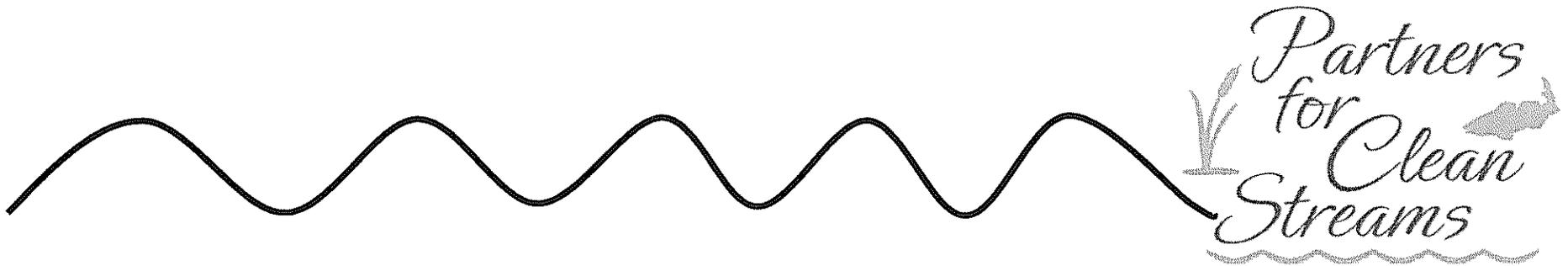
Budget/Cost Analysis

			(as of 11/03/2010)	
Total Estimated Hours	249 Hours		Total Actual Hours	252 Hours
X Blended Rate	<u>\$50/Hour</u>		X Blended Rate	<u>\$50/Hour</u>
<i>Estimated Budget</i>	\$12,450		<i>Actual Budget</i>	\$12,600
\$150 over budget as of 11/03/2010				



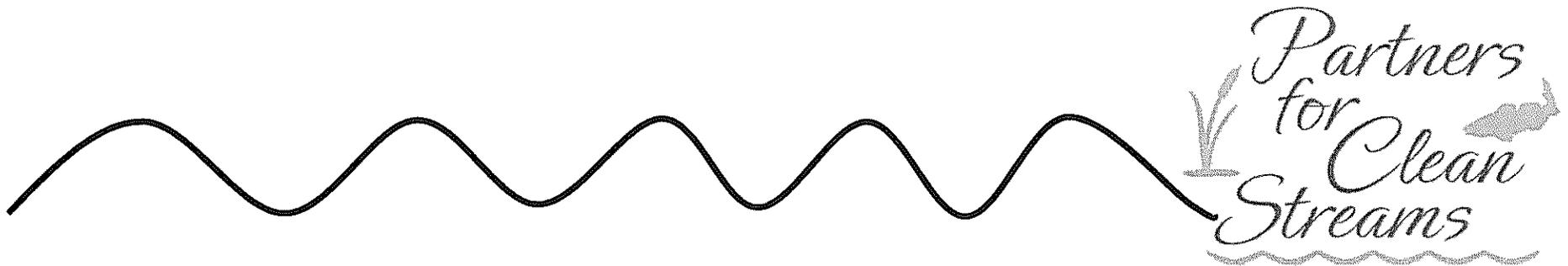
Risks

- Project plans are not completed in time to fulfill class requirements
- Project team members will not complete their tasks on time
- Team members will miss project meetings



Quality

- Maintained by communicating internally and externally with PCS and Nelson
- MS Live website used as central document repository
- Each team member responsible for quality of the project content they produced

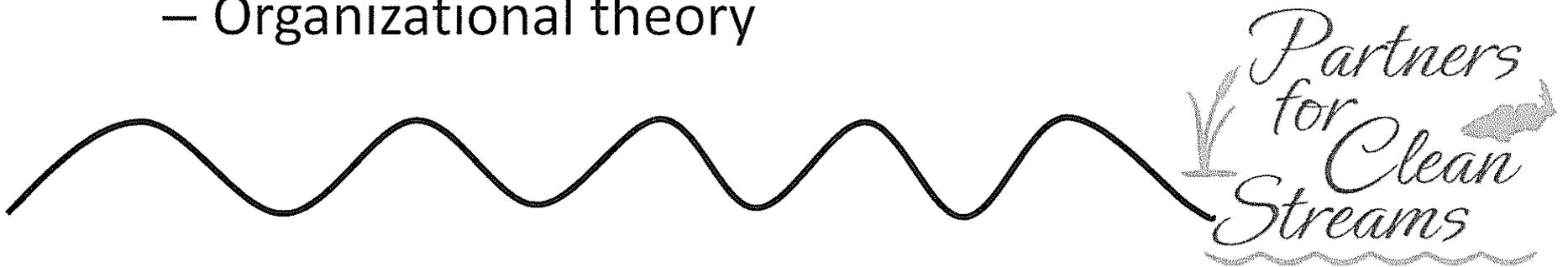


Human Resource Planning

- Ensures each work package has a designated owner
- Ensures all project team members have a clear understanding of their roles and responsibilities

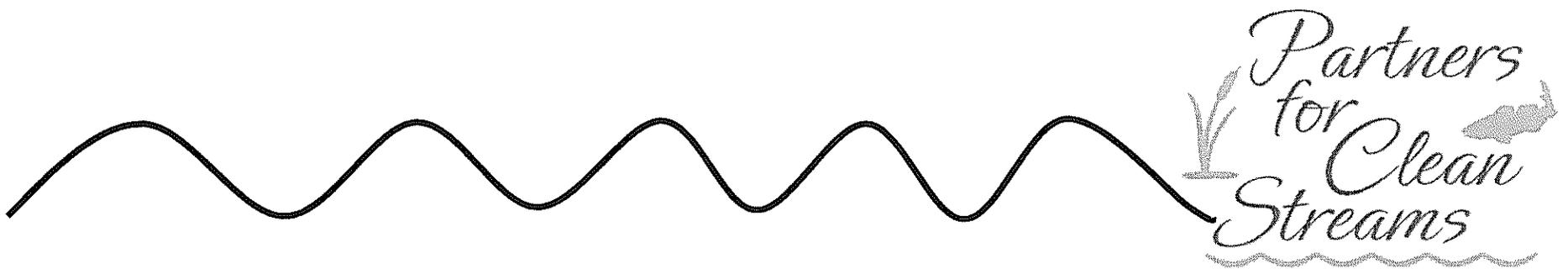
HR planning tools and techniques include:

- Organization charts and position descriptions
- Networking
- Organizational theory



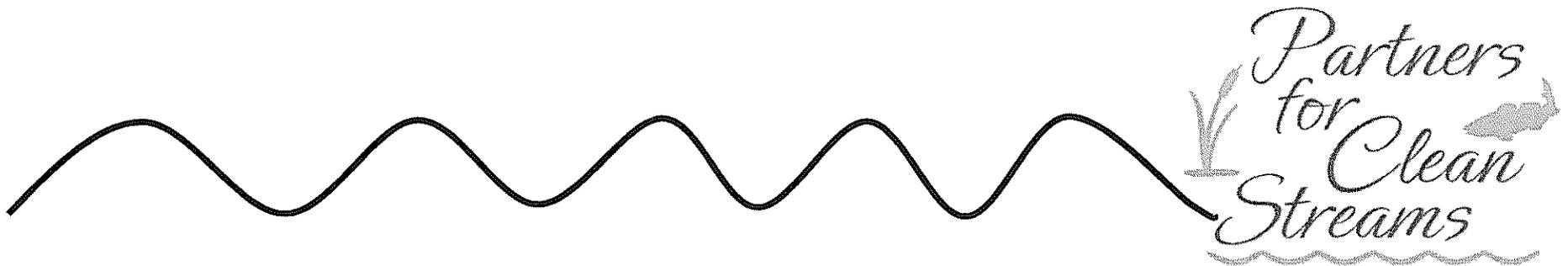
Organization Charts and Position Descriptions

- Hierarchical-type Organization Charts – show positions and relationships in a graphic, top-down format.
- Matrix-based Responsibility Charts – illustrate connections between work packages and project team members.
- Text Oriented Formats – provide detailed responsibilities, authority, competencies and qualifications in outline form.



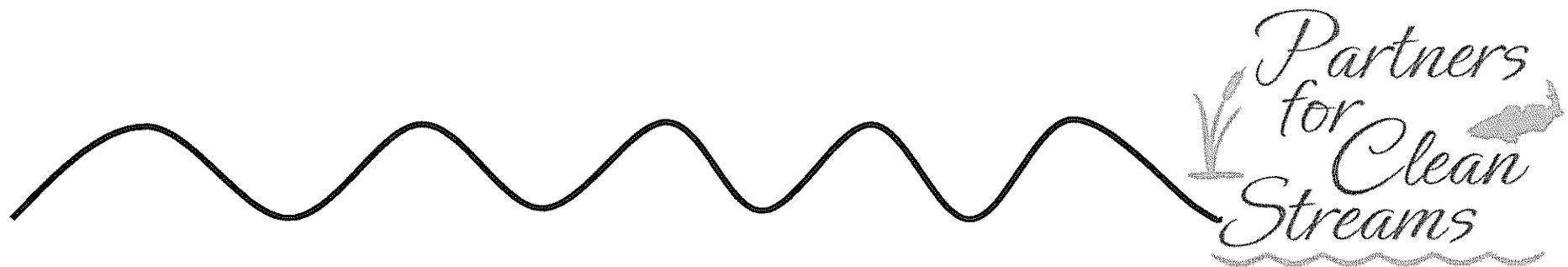
Responsibility Assignment Matrix (RAM)

- High Level – defines what a project team group or unit is responsible for within each part of the WBS
- Lower Level – used within a group to designate roles, responsibilities and level of authority for specific activities.



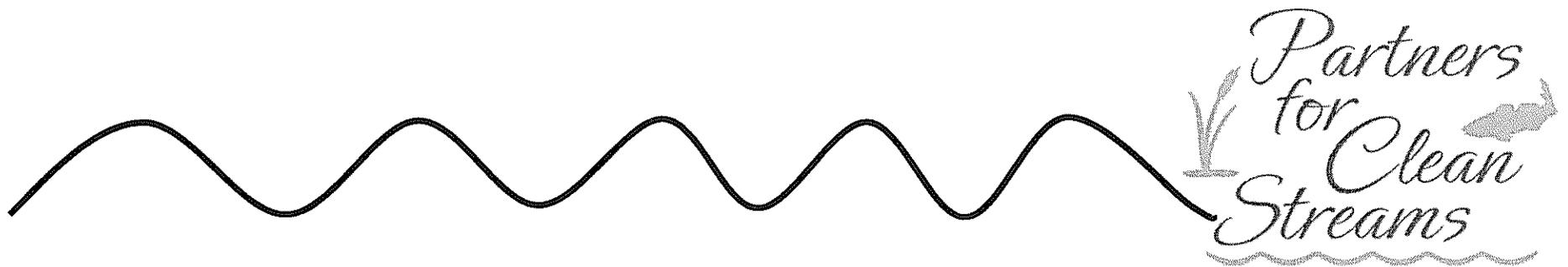
Responsible, Accountable, Consult and Inform (RACI) Matrix

Activity/Task	Kris (Sponsor)	Brian (PM)	Beverly	Eric	Lois	Melissa	Nicole
Agenda – PCS PMD		R	A				
Minutes – PCS PMD		A	R				
SOW – PCS PMD				R			
SOW – PCS GLRI	C			R			
Charter – PCS PMD		R					
Charter – PCS GLRI	C	R					
WBS – PCS PMD							R
WBS – PCS GLRI	C					R	

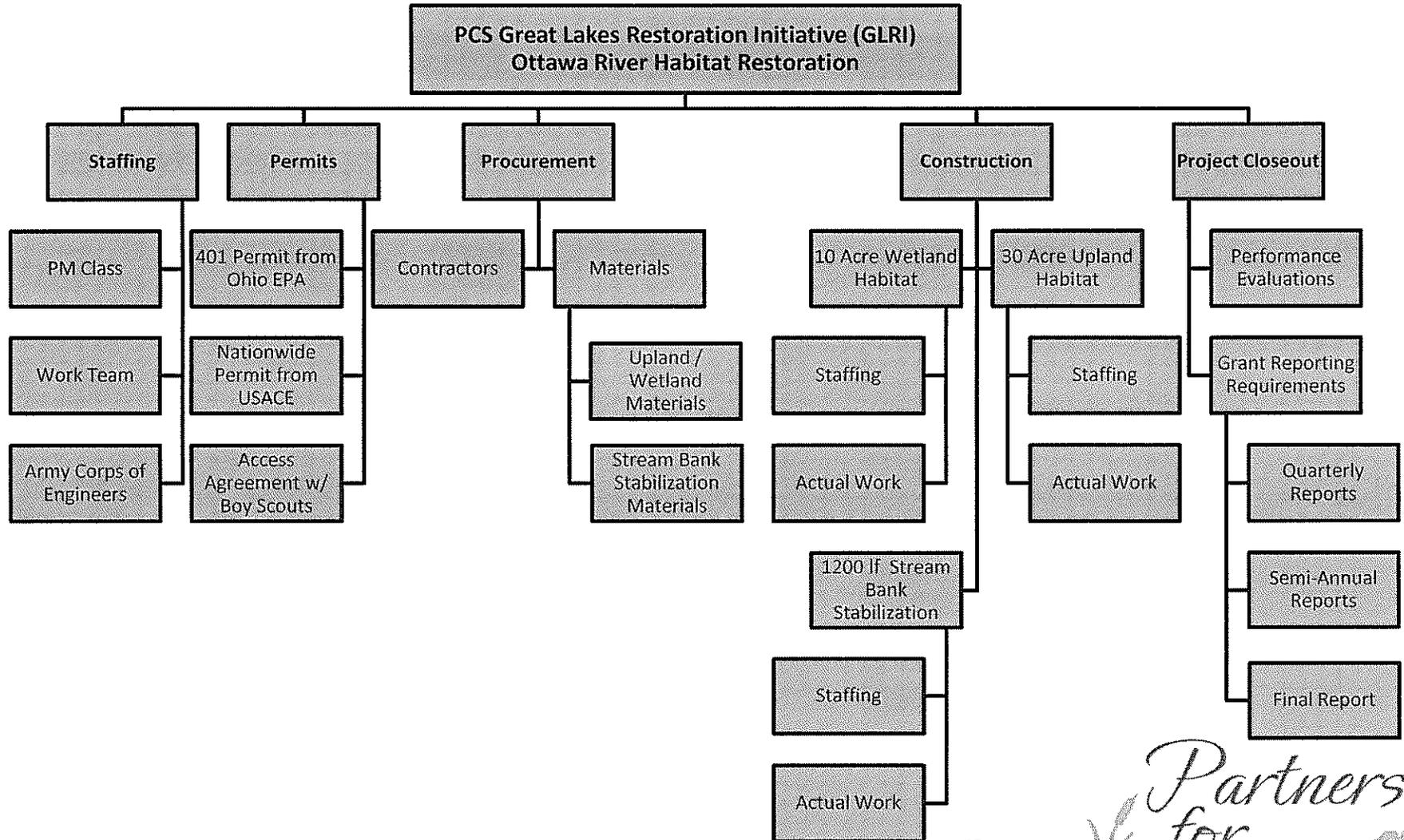


PCS Great Lakes Restoration Initiative Documents Produced

- Statement of Work
- Project Charter
- Scope Statement
- Work Breakdown Schedule
- Project Schedule
- Communication Plan
- Cost (Match) Document
- RFP Document



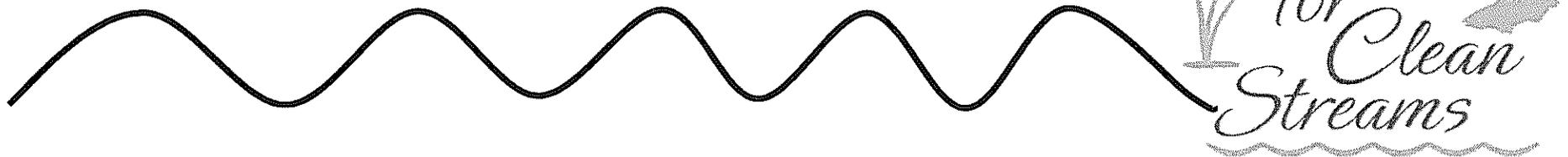
Work Breakdown Structure



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Lessons Learned

- Discuss communication strategies/sharing in the beginning. Make sure discussion includes the following:
 - Software versions and availability to teammates
 - E-mail structure and servers
 - Consistent document nomenclature
 - Centralized storing area for documents
 - Everyone has a clear understanding of project vs. product
- Follow-up, follow-up, follow-up





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Great Lakes Restoration Initiative

Project Management Documents

Project Manager: Brian Patterson

Project Team: Beverly Cooper

Melissa Hennon

Eric Herzog

Lois Jones

Nicole Northrup



Statement of Work

Partners for Clean Streams (PCS) Great Lakes Restoration Initiative (GLRI) Ottawa River Habitat Restoration Project

A. Introduction/Background

Partners for Clean Streams(PCS) is a 501(c)3 non-profit community organization with an interest in supporting local and regional water quality improvements in the metro-Toledo area. Currently, PCS is in the process of utilizing a Great Lakes Restoration Initiative (GLRI) grant to implement a stream restoration and habitat improvement project. This project will result in the creation of 10 acres of wetland habitat, 30 acres of upland habitat improvement, and 1200 lineal feet of stream bank stabilization/restoration. The project was selected based upon location within the Maumee Area of Concern (AOC) and ability to work cooperatively with the Boy Scouts to provide needed property improvements and educational opportunities.

B. Objectives

The objective of this project is to improve the habitat of the Ottawa river riparian corridor on and adjacent to Camp Miakonda and provide educational opportunities for the Boy Scouts.

C. Scope of Work

The project will commence in calendar year 2010 and be completed in the fall of 2012. Work will include creation of 10 acres of wetland habitat, 30 acres of upland habitat improvement, and 1200 lineal feet of stream bank stabilization/restoration.



Project Charter

Project Title and Description:

The title of this project is Partners for Clean Streams (PCS) Great Lakes Restoration Initiative (GLRI) Ottawa River habitat restoration project. The project will result in the creation of 10 acres of wetland habitat, 30 acres of upland habitat improvement, and 1200 lineal feet of stream bank stabilization.

Project Manager Assigned and Level of Authority:

Kristina Patterson will be assigned as the project manager and will be given the authority to lead the project. Mrs. Patterson will be responsible for assuring project is completed within the granted budget. She will also be responsible for developing contracts and policies associated with staff and contractor procurement. She will also have the authority to hire additional resources as needed to assist her with delivery of the completed project.

Acceptance Criteria:

Were 10 acres of wetlands created? Have 30 acres of upland habitat been improved? Have 1200 lineal feet of stem banks been stabilized? Is the project completed within budget? Are the Boy Scouts of America (BSA) satisfied with the changes to their property?

Business Case:

The project will further the goals of PCS and the Maumee RAP to eventually delist the river from the Maumee Area of Concern. This high profile project will lessen the impact of years of development by restoring and improving habitat on and adjacent to Camp Miakonda and the Ottawa River in Toledo, Ohio.

Project Cost Analysis:

The estimated budget for this project is \$ 1,365, 689.00.

Product Description / Deliverables:

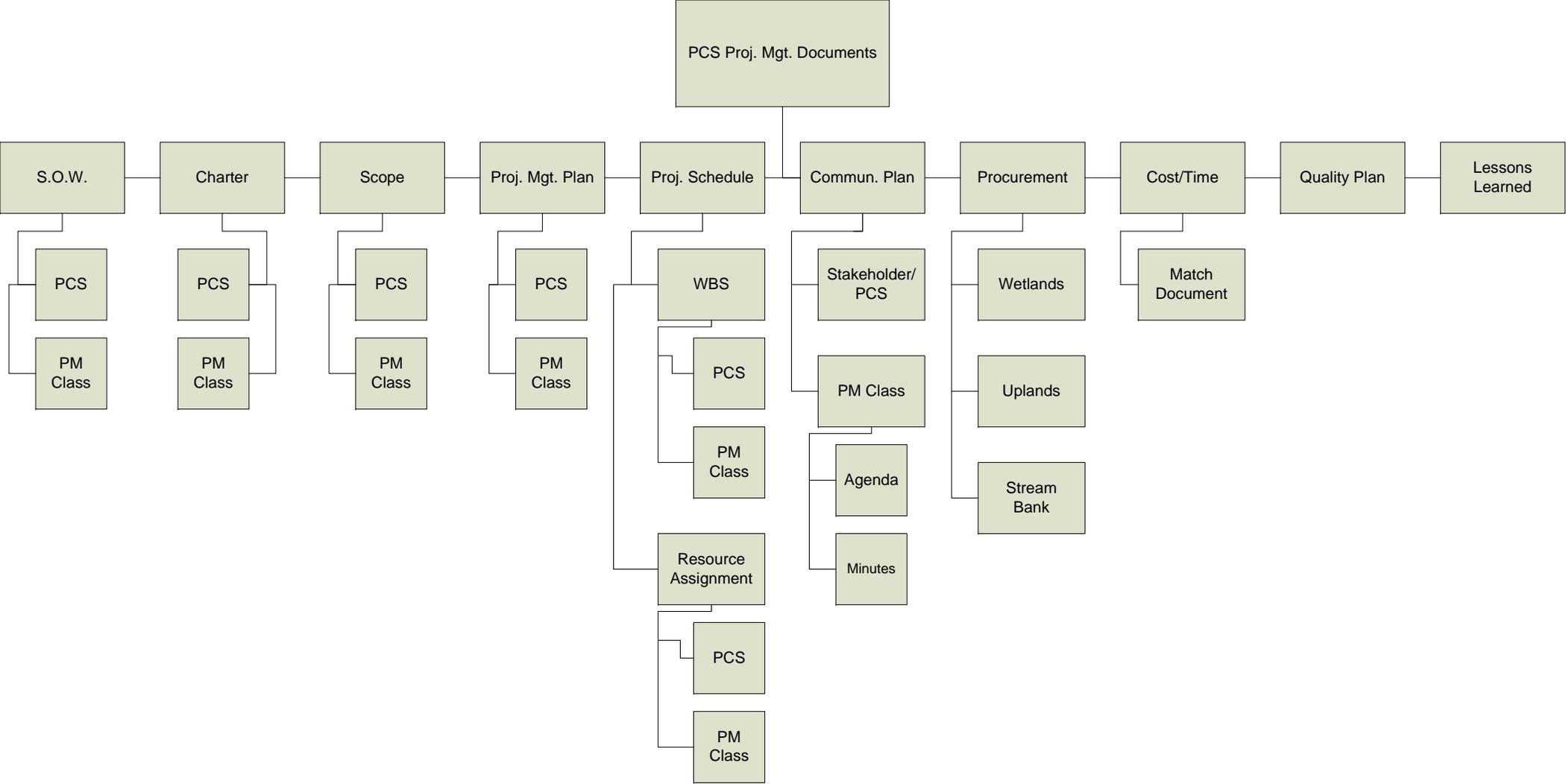
The project will be broken into two sub projects; wetland /upland habitat construction and improvement, and stream bank stabilization/restoration. The first subproject will create 10 acres of wetland habitat in Lake Sawyer and 30 acres of upland habitat improvement in the riparian corridor adjacent to Lake Sawyer and the Ottawa River. The second subproject will result in the stabilization and restoration of 1200 lineal feet of Ottawa River stream bank using a variety of methods developed by the Army Corps of Engineers. The project shall be completed in accordance with state and federal regulations.

Risks and/or Assumptions:

- Project plans are completed in time to secure necessary permits prior to initiating construction.
- Permits are secured within 180 days of application.
- Weather is favorable for construction and establishment of plants.
- Maintenance of project continues beyond grant completion date.
- PCS is able to find competent staff willing to work within constraints of available funding.
- PCS is able to secure contractors within the constraints of available funding

Signed and Approved by:

Patrick Lawrence
President, Partners for Clean Streams



DAS PM CLASS, Group Project: PCS PMD								Subtotal, All Class Hours	Subtotal, Hours Outside Class	TOTAL, All hours on PCS Project
In-kind Record - Class Hours (Tu) 2010										
DATE	9/28	10/5	10/12	10/19	10/26	11/2	11/9			
NAME										
Beverly Cooper	1.50	1.00	6.50	7.00	5.00	6.50	0.00	27.50		27.00
Eric Herzog	1.50	1.00	6.50	7.00	5.00	6.50	0.00	27.50		10.50
Melissa Hennon	1.50	1.00	6.50	6.50	6.00	6.50	0.00	28.00		39.00
Lois Jones	1.50	1.00	5.75	4.50	5.50	6.00	0.00	24.25		11.00
Nicole Northrup	1.50	0.00	6.50	6.00	0.00	5.00	0.00	19.00		9.75
Brian Patterson	1.50	1.00	6.50	7.00	0.00	6.50	0.00	22.50		31.00
										54.50
										38.00
										67.00
										35.25
										28.75
										53.50

FINAL - as of 5:00 p.m. on 11/8/2010.

DAS PM CLASS, Group Project: Partners for Clean Streams Project Management Documents (PCS PMD)																																Subtotal, Hours Outside Class										
In-kind Record - Hours Outside Class, 2010																																										
DATE	W	Th	F	Sa	Su	M	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	W	Th	F	Sa	Su	M	W	Th	F	S	S	M	Tu	Tu	Tu								
NAME																																										
Beverly Cooper	0.50	0.50	0.00	0.00	0.00	1.50	0.00	0.00	0.00	0.00	0.00	1.00	2.00	0.00	0.00	0.00	0.00	0.00	2.00	0.00	0.00	0.00	0.00	1.50	0.00	4.00	0.00	0.00	6.00	3.00	0.00	0.00	0.00	1.00	0.00	2.00	0.00	2.00	0.00	27.00		
Eric Herzog	0.00	0.00	0.00	0.00	0.00	0.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00	0.00	1.00	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	3.00	0.00	0.00	0.00	3.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	10.50
Melissa Hennon	0.00	0.00	0.00	0.00	0.00	1.50	0.00	0.00	0.00	0.00	3.00	0.00	1.00	0.00	1.00	1.00	0.00	2.00	5.00	3.00	0.50	0.00	0.00	1.00	4.00	0.00	0.00	0.00	1.00	0.00	1.50	2.50	1.50	0.00	1.00	5.00	2.50	1.00	2.00	0.00	39.00	
Lois Jones	0.00	0.00	0.00	0.00	0.00	2.00	0.00	0.00	0.00	0.00	0.00	0.00	2.00	0.00	0.00	0.00	3.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.00	1.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.00	
Nicole Northrup	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00	1.00	0.00	0.00	0.00	0.00	1.00	1.50	0.00	0.00	1.00	0.00	1.00	0.00	1.00	1.25	0.00	0.00	0.00	0.00	0.00	1.00	0.00	0.00	0.00	9.75		
Brian Patterson	0.00	1.00	0.00	0.00	1.00	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.00	1.00	0.00	0.00	0.00	0.00	2.00	2.00	1.00	7.50	3.00	0.00	1.00	0.00	0.00	1.50	2.00	0.00	0.00	3.00	1.00	31.00			