



OREGON BOARD OF FORESTRY/DEPARTMENT OF FORESTRY

DECISION SUPPORT SYSTEM PHASE 2

PROJECT PLAN

OCTOBER 16, 2008

| REQUESTOR | SPONSOR(S) | PROJECT MANAGER | START DATE | END DATE |
|-------------|-------------|------------------------------|------------|------------|
| Clark Seely | Clark Seely | Dale Johnson Diana Morris | 10/08/08 | 03/0631/09 |

| PROJECT DESCRIPTION |
|--|
| <p>ODF has procured Ascentium, an interactive design and technology consulting firm, to develop Phase 2 of the Decision Support System. In order to assist ODF in improving productivity, communication, and decision making, Ascentium will analyze existing manual work flows and build a decision support system using various capabilities of Microsoft SharePoint Server 2007 (MOSS).</p> <p>This solution at Phase 2 will be mainly targeted for the BOF members and the ODF employees that provide the content necessary for BOF members to make decisions. Ascentium will begin by setting up a content repository in MOSS. Files maintained in this repository will include meta data or content types and be organized to support ODF work processes. Ascentium will assist ODF in identifying appropriate content types along and create the information architecture for the DSS. This will help ensure that the process of uploading documents is simple to use and that users searching for information have a higher likelihood of finding pertinent information.</p> <p>Ascentium will also perform an infrastructure assessment, set-up a test and development environment at ODF, set up a production environment at the State Data Center (SDC), and deploy the DSS into production as part of implementation. With input from Ascentium, ODF will migrate content from existing physical and electronic storage into the DSS to support the BOF beginning in early 2009.</p> |

| OBJECTIVES & SUCCESS CRITERIA | | |
|--|---|--|
| Objectives | Success Criteria | How Measured |
| Validate or update problem statement created during Phase 1 | Needs are described in current terms | When needs re-assessment is completed in documented form |
| Define requirements ("stories") outlining desired functionality for the DSS based on input from stakeholders | Requirements are well understood and documented in the form of stories | When assessment and planning is complete and list of stories is available in documented form |
| Install and configure SharePoint system in production environment at State Data Center | Server, operating system, and SharePoint installed and accessible from ODF network | Users are able to access DSS SharePoint site from ODF network |
| Design and implement the initial system portal for ODF staff to upload Board documentation | Functioning portal is in place and technical training is adequately completed | Functioning portal is bug-free and users are capable of performing basic tasks |
| Design and deploy a content repository for Board documentation, allowing BOF members and ODF staff to search and locate that information | Functioning content repository is in place and technical training is adequately completed | Functioning content repository is bug-free and users are capable of performing basic tasks |

| ASSUMPTIONS | CONSTRAINTS |
|---|--|
| Ascentium will implement the DSS system using the Agile methodology. | Ascentium contract budget is fixed per state procurement rules. |
| Ascentium will perform most work at their offices in Portland. On-site meetings will be held at ODF | Availability of ODF resources for workshops, follow-up sessions, iteration planning, and retrospective |

| | |
|--|--|
| headquarters in Salem. | meeting. |
| ODF will provide Ascentium with physical and logical access to ODF systems as required for support of this project. | Availability of State Data Center resources to work with Ascentium infrastructure consultants. |
| ODF owns or will purchase all necessary hardware and software for the project. | Hardware and software procurement requires a lag time and must occur in a timely manner to prevent delays in the project schedule. |
| The SharePoint environments in development, test and production will all be two server implementations (one web server and one database server). | |
| The SharePoint development and test environment will be set-up at ODF. The production environment will be set up at the State Data Center. | |
| | |

| STAKEHOLDERS | |
|---|--|
| Interested Parties | Why Interested |
| Project Manager | Successful project completion |
| Project Team Members | Successful project completion |
| Sponsor | Governance and Process Effectiveness |
| Board of Forestry | Governance and Process Effectiveness |
| ODF Program/Unit Managers, District Foresters | Process Effectiveness and Information Management |
| ODF Executive Team, State Forester | Governance and Process Effectiveness |
| ODF Staff | Process Effectiveness |
| State Data Center | Technical Effectiveness and Security |
| Public | Transparency and Input Availability |

| RELATED PROJECTS |
|---|
| <ul style="list-style-type: none"> - Decision Support System Assessment Project, Phase I, Ascentium, completed 11/21/2005 - Business Process Modeling, Sanborn et al, planned completion in January 2009 - Decision Support System Completion Project, Phase 3, TBD via RFP, planned completion 2009 - ODF Intranet Web Development/Governance Project, TBD via RFP, planned completion 2009 - Electronic Records Management System, TBD via RFP or Price Agreement, planned completion 2009 (may be handled by DSS Phase 2 and 3 via MOSS deployment) |

| PRIORITY ASSESSMENT | | | | | |
|-----------------------------|--------------|-------------|-------------|----------------|-------------|
| Level of Importance: | Scope | Time | Cost | Quality | Risk |
| Highest | | | X | X | |
| Medium | | X | | | X |
| Lowest | X | | | | |

| PROJECT TEAM | | |
|---------------------------------------|-------------------|------------------------------------|
| Resource Name | Role | Focus Areas |
| Dale Johnson, Project Manager | Project Manager | Leadership, all sub-committees |
| Diana Morris, Records Manager | Project Manager | Leadership, all sub-committees |
| Clark Seely, Associate State Forester | Executive Sponsor | Leadership, Governance, Board |
| Dan Postrel, Agency Affairs | Core Team | Governance, Portal, Board |
| Jim Paul, Executive Team | Core Team | Governance, Board |
| Gayle Birch, BOF Support | Core Team | Board, Portal |
| Jeri Chase, Agency Affairs | Core Team | Board, Content, Portal, Deployment |

| | | |
|--|------------------------|------------------------------|
| Kathleen Gomez, Exec. Support | Administrative Support | All sub-committees |
| Jill Bradford, Executive Support | Core Team | Content, Deployment |
| Jeff Foreman, Agency Affairs | Core Team | Portal, Board, Deployment |
| Rosemary Mannix, State Forests Barbara Lee, State Forests | Core Team | Content, Portal, Board |
| Chris Cottrell, Executive Support | Core Team | Content, Deployment |
| Kris Cody, Word Processing | Core Team | Content |
| Sharon Martin, Word Processing | Core Team | Content |
| Mark Fouts, Systems Administrator | Core Team | Deployment |
| Barbara Craig, Board Member | Extended Team | N/A |
| William Hutchison, Board Member | Extended Team | N/A |
| Sandy Jefferson, CIO | Extended Team | Leadership |
| Sherri Andrews, Information Systems | Extended Team | Deployment (SDC issues only) |
| Jan Toepfer, Information Systems | Extended Team | Deployment (SDC issues only) |

| Sub Committee | Description |
|---------------|--|
| Governance | Set direction, vision and overall purpose of the DSS. Create initial set of guidelines and policies on use. Resolve questions regarding work flow, security, and other administrative issues |
| Content | Assess information and content required by the Board, including content types and current location. Work with Ascentium on determining document taxonomy and migration plan. |
| Portal | Represent the 'voice' of ODF staff in determining requirements for the Portal, including the typical workflow of information as it progresses from inception to approval for Board review during meetings. |
| Board | Represent the 'voice' of the Board in determining requirements for the Board DSS site, including typical workflow of information once created and approved for Board meetings. |
| Deployment | Determine and contribute to plan on system installation, pilot, training, and rollout communication. |

| DELIVERABLES | | |
|---------------------------|--|-----------------------------------|
| Task | Milestone / Deliverable | Owner |
| Kick-Off Meeting | Kick-off meeting attended by full project team | Ascentium, ODF |
| Project Management | Project Plan document and project schedule | ODF |
| | Project Status Reports | Ascentium, ODF |
| Infrastructure Assessment | Detailed Assessment Report illustrating the findings of the Infrastructure Assessment efforts, including a breakdown of Microsoft Share Point Server 2007 (MOSS) infrastructure and recommended hardware and software. | Ascentium |
| Infrastructure Set-up | Test all possible aspects of the initial platform and distribute the results of that testing to ODF/SDC | Ascentium |
| | Identify additional risks or gaps, delivered in the form of a Risk Report that is updated anytime the information in the original Risk Report changes. | Ascentium |
| | Build out of the Production Environment and report the results of this effort regularly to ODF. | Ascentium (with support from SDC) |

| | | |
|---|--|-----------|
| | MOSS configuration documents | Ascentium |
| Planning and Re-assessment | List of stories | Ascentium |
| | Review and prioritize stories to guide iterative development effort | ODF |
| | Diagram or document defining the information architecture (IA) of the site. | Ascentium |
| | Two design comps of the ODF BOF site | Ascentium |
| | Content migration plan | Ascentium |
| Development/Implementation (Four Separate Iterations) | Set up the MOSS content repository and the DSS portal on development and test environments | Ascentium |
| | Demonstrate new, expanded or modified functionality completed during the course of the iteration | Ascentium |
| | Provide four hours of knowledge transfer | Ascentium |
| | Source code for the MOSS content repository and DSS portal | Ascentium |
| Deployment | Set up the MOSS content repository and DSS portal in production environment | Ascentium |
| | Migrate content to DSS portal | ODF |
| | Conduct training for ODF technical staff | Ascentium |
| | Conduct training to end users | ODF |
| Closeout | Submit a Completion Report | Ascentium |
| | Provide approved warranty on MOSS content repository and DSS portal | Ascentium |
| <p>Notes/Comments on Deliverables: While most deliverables are contractual obligations from Ascentium, it is important to note that ODF team members play a vital role in the project. Additionally, ODF is responsible for two key aspects of this project, mainly content migration and end user training.</p> <p>See project Statement of Work and project schedule for complete details of the project deliverables, milestones, and tasks.</p> | | |

| COMMUNICATION PLAN | | | | | |
|------------------------|--|--------------------------|------------------------------|-------------------|---|
| Name | Target Audience(s) | Delivery Method | Delivery Frequency | Who Responsible ? | Purpose |
| Project Charter | All project stakeholders (except the Public) | Email, SharePoint | Once | ODF PM | Describe business problem and project |
| Status Reports | ODF team | Email, SharePoint | Weekly | ODF PM | Regular update on project progress, open issues, risks. Publish within two business days of Internal Team Meeting |
| Daily Stand-ups | Ascentium, ODF PMs, select ODF team members | Meeting, conference call | Daily | Ascentium PM | Quickly review progress on Stories and open issues. No minutes published. Update Issue log as needed. |
| Internal Team Meetings | ODF team | Meeting | Weekly, Tuesday at 9:00 a.m. | ODF PM | Discuss completed tasks, upcoming tasks, |

| | | | | | |
|--|----------------------------------|-------------------|---|-----------------|---|
| | | | | | issues, risks. Minutes published via email and to SharePoint. |
| Change Management | ODF team | Meeting | Weekly, in Internal Team Meeting | ODF PM | Review requests for change of scope to the contract. Update Change log as needed. |
| Iteration Planning Meeting | Ascentium, ODF team | Meeting | Four meetings, at start of each iteration | Ascentium PM | Prioritize and choose Stories to work on during upcoming iteration. Update Story log, publish prioritized list of Stories. |
| Iteration Demo and Retrospective Meeting | Ascentium, ODF team | Meeting | Four meetings, at end of each iteration | Ascentium PM | Review work completed during iteration; adjust priorities as needed, Minutes published via email and to SharePoint. |
| Sub-Committee Working Meetings | ODF team, sub-committee members | Meeting | Scheduled as required | ODF PM | Review Story descriptions, assist with prioritization, act as expert in focus area |
| Sponsor Meetings | ODF PMs, sponsor, ODF leadership | Meeting | Following Iteration Demo and Retrospective Meetings | ODF PM | High level review of project progress, outstanding change requests, open issues and risks. Minutes published via email and to SharePoint. |
| Project Update Executive Summary | Board | Email, SharePoint | Following Second Iteration, Start of Deployment | ODF PM, Sponsor | High level summary of project status |
| Project Post-Mortem | ODF team | Email, SharePoint | Following Deployment | ODF PM | Review of project success and challenges, Minutes published via email and to SharePoint |

DECISION MAKING PROCESS

In general, ODF wishes to reach consensus on all major project decisions, including the prioritization and selection of Stories to be developed as part of each Ascentium development iteration. However, the DSS project team is large and it is not feasible for all members of the team to be fully involved in all decisions. Nor is it possible for the entire team to be involved in the initial creation of all Stories, plans, and other project proposals. Therefore, the DSS project will rely on sub-committees (defined in the Project Team section) to perform much of the initial work.

Members of the sub-committees will be responsible for providing feedback on Stories and presenting other project proposals to the entire team so informed decisions can be made by the team. The preferred decision making method is by consensus and reasonable time will be allocated during meetings for the team to discuss and reach a decision. In the event a consensus decision cannot be reached by the team, the project sponsor will be responsible for a final decision, paying particular attention to the views of the appropriate sub-committee (s) involved in reviewing the Stories or preparing the proposals.

The project sponsor also reserves veto right for all decisions reached by the DSS project team.

CHANGE MANAGEMENT

The goal of the change control process is to ensure changes are managed in a consistent manner and the appropriate stakeholders are informed of the state of the DSS and the impact of potential changes to cost, scope, schedule, or quality (note: in this project, the Ascentium budget is fixed and no increase to that budget is possible).

Two separate methods for controlling change will be used in the DSS project, depending upon the nature of the change. Ascentium is managing the development of the DSS using the Agile methodology. As such, ODF will follow the methodology for managing the creation, selection, and prioritization of functionality ("Stories") as defined in the Ascentium Statement of Work. The approval of the Stories being developed during each iteration will occur following the Decision Making Process defined above, with particular attention paid to the feedback provided by the appropriate sub-committee members.

A separate and different process is to be followed for changes to the scope of the contract with Ascentium or if any Story is selected as part of the Iteration Planning Meeting that changes the schedule or cost of the project. In this case, a Change Request is to be logged with or by the ODF project manager. Each Change Request will contain the following information and be logged in the Change Request Log:

- Description – information on the nature and type of change, including the impact to cost, scope, or schedule.
- Date – date the change request was submitted or created.
- Requester – name of the person who submitted the change request.
- Business Need – describe why this particular change necessary and the impact to the project if the change is not approved.

The Change Request will be reviewed by the ODF project managers, sponsor and leadership team to determine whether to approve, deny, or defer decision on the Change Request. That decision will be logged in the Change Request log and communicated to the team.

RISK MANAGEMENT PLAN

The ODF project manager will maintain a list of items that could potentially, adversely affect project scope, cost, or schedule. These risk items will be tracked actively throughout the project in a Risk Log and regularly reviewed during the Internal Team and Sponsor Meetings.

The Risk Log will contain:

- Risk Description – Describe the end consequence if the identified risk event occurs.
- Impact – What is the primary impact to the project – Scope, Schedule, Budget, or Quality?
- Probability – What is the probability of the risk event occurring? Rate on a scale from 1 (very low) to 10 (very high).
- Severity – What is the severity or amount of harm to the project objectives, if the risk event occurs? Rate on a scale of 1 (very low) to 10 (very high).
- Risk Factor – calculated field of Probability * Severity, providing a rough ranking of risks to the project.

For those Risk identified as high priority based on the Risk Factor, ODF project manager in conjunction with the ODF team and sponsor will decide on how to respond to that risk.

- Accept – Acknowledge the risk and intentionally decide against mitigating the risk.
- Avoid – Take steps to reduce or eliminate the possibility of the risk event taking place.
- Reduce – Take steps to reduce the impact of the event.
- Transfer – Take steps to transfer the risk to another party.

Based on these classifications, the ODF project manager and team can develop plans to mitigate risk events (Avoid, Reduce or Transfer) or create contingency plans for those risks that will not be mitigated during the course of the project. These risk plans should be added to the project schedule and tracked along with other project tasks.

PROJECT SCHEDULE

To be attached.