

# Modernization Program Schedule Management Plan

Version: 2.0

Revision date: August 2019

## TABLE OF CONTENTS

Program Overview .....	3
Document Purpose .....	3
Document Relationships .....	3
Document Audience .....	4
Risks, Assumptions, and Constraints .....	4
Roles and Responsibilities.....	5
Schedule Approach .....	8
Schedule Structure.....	9
Schedule Development .....	10
Schedule Maintenance .....	13
Schedule Monitoring and Controlling.....	13
Schedule Baseline, Variance, and Change Control .....	14
Resource Management.....	15
Schedule Reporting and Communication .....	17
Document Maintenance .....	18
Approving Authorities.....	18
Appendix A – Monthly Schedule Report Examples.....	19
Appendix B – Quarterly Budget/Schedule Variance Report Template.....	20

## TABLES AND FIGURES

Table 1 – Roles and Responsibilities .....	5
Figure 1 – Modernization Timeline.....	8
Figure 2 – Master Program Schedule Components .....	9
Figure 3 – Program Management Schedule Component Example (Rolled Up).....	10
Figure 4 – Project Schedule Component Example (Rolled Up).....	10
Table 2 – Schedule Variance Health Ratings.....	15

## Program Overview

The Employment Department's Modernization Program is a multi-year initiative focused on transforming the agency's business processes and core technology systems. Computer systems supporting receipt of unemployment insurance taxes, payment of unemployment insurance benefits, and delivery of employment services will be replaced. Further, business processes will be transformed to take advantage of opportunities and benefits available through new system capabilities.

## Document Purpose

This plan defines the Modernization Program's master program schedule and schedule components that will be developed, managed, and reported throughout the duration of the program. Additionally, this plan identifies specific roles and responsibilities for maintaining the overall master program schedule, defines the level of tracking and reporting, and describes the processes and tools that will be used. Further, the plan establishes expectations and thresholds for tracking and reporting variance, as well as the process that will be used to ensure schedule delays or performance concerns are reviewed and addressed.

## Document Relationships

This plan is an extension of the Modernization Program's Program Management Plan. It is expected that all modernization projects will adhere to the processes and details described herein. This plan also relies upon or references these other plans.

- Modernization Program Management Plan – provides the overall framework for the program and the program management plans covering each specific process.
- Modernization Program Risk and Issue Management Plan – this program-level plan describes the risk and issue management process; the risk registry contains risks identified for each project management process.
- Modernization Program Scope Management Plan – describes the scope management process; this may be important as addition or changes in scope would likely impact scheduled activities.
- Modernization Program Staff Management Plan – describes how resource needs are identified, assigned, and managed.
- Modernization Program Communications and Outreach Plan – describes how information, including schedule information, is communicated; the communications registry tracks the specific communications, content, and stakeholders.
- Modernization Program Change Control Plan – describes the change control process and approval of schedule changes above established thresholds.

## Document Audience

This document is intended for these primary audiences:

- **Program sponsors and steering committee members** – to understand processes that will be followed, as well as their role in identifying and responding to schedule risks and issues. They also have a responsibility to ensure processes are appropriate and are enforced.
- **Internal and external oversight entities** – to monitor whether appropriate processes are in place and continue to be followed.
- **Program and project team members and vendor staff** – to understand processes that will be followed, as well as their role in identifying and responding to schedule risks and issues.
- **Agency employees** – to reference for general awareness.

## Risks, Assumptions, and Constraints

### RISKS

Risks related to schedule and other project management process groups are described and managed through the program's risk and issue process. See the program's risk management plan for further details on the risk and issue process.

### ASSUMPTIONS

- The schedule management processes developed to support modernization projects will be based upon and adhere to Project Management Institute's (PMI) Project Management Body of Knowledge (PMBOK).
- The schedule will be developed and maintained using Microsoft Project version 2016 or higher.
- The solution vendor will comply with the processes and rigor required to manage the schedule and track progress.
- Operational staff will be available as subject matter experts (SMEs) when activities are scheduled requiring their expertise and input.
- Expanded team resources will be allocated as required and will be dedicated to the program or project for the duration of their scheduled activities.
- Operational areas will communicate other agency initiatives or activities that could impact the program's schedule related to resource assignments.
- Managers or team leads will resolve issues for staff performing work within their schedule areas. If issues cannot be resolved, they will be escalated to the modernization leadership team.
- Team leads or task owners will collaborate to create meaningful work breakdown structures and estimates, and will report performance accurately against their respective schedules so that planned and actual progress is transparent.

## CONSTRAINTS

- Operational timelines and workloads must be considered as the schedule is planned.
- Resource constraints may occur if timing of activities deviates from the original plan.
- Task start or finish dates may be dependent upon completion of another task or work stream.
- If schedule baselines change by +/- 10%, Office of the State Chief Information Officer (OSCIO) must be notified and review for re-endorsement.

## Roles and Responsibilities

Significant roles and responsibilities involved in these processes are described below.

**Table 1 – Roles and Responsibilities**

Role	Responsibilities
Modernization Sponsor (Modernization Director)	Provides overall leadership and direction in the development and maintenance of the program and project schedules.  Removes barriers and works with agency leadership and vendors to plan and coordinate resources and to resolve resource constraints affecting the master program schedule.  Removes barriers related to schedule conflicts with external stakeholders or internal agency stakeholders.  Accountable for ensuring that schedules are achievable, for monitoring and controlling to project in accordance with the schedule, and for ensuring that the schedule appropriately reflects all available information.  Reviews and approves schedule reporting.
Modernization managers	Ensures that assigned staff perform the work within the master program schedule.  Works with Modernization Schedule Project Manager, team leads, or task owners to monitor schedule progress.

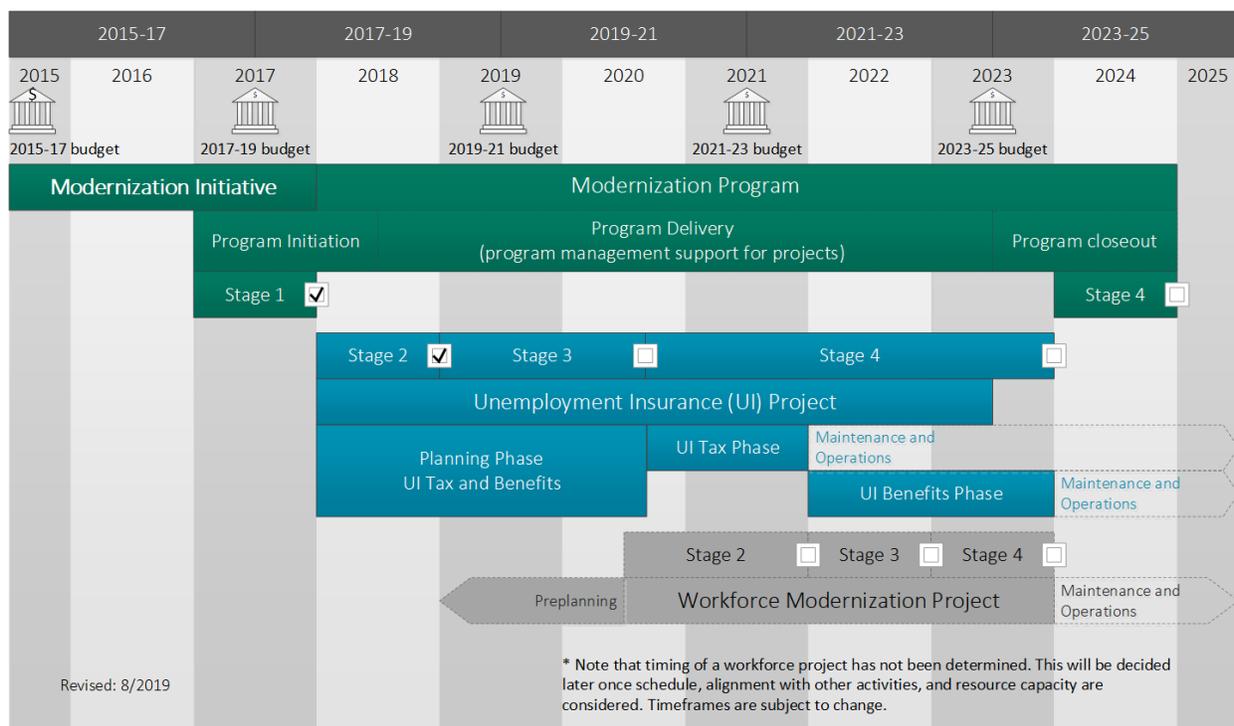
Role	Responsibilities
<p>Modernization Program Manager</p>	<p>Develops the schedule management strategy, and works with Modernization Schedule Project Manager to develop the schedule and ensure sufficient management processes.</p> <p>Guides the development and maintenance of the master program schedule.</p> <p>Works with the Modernization Schedule Project Manager to create schedule progress and variance reports for Sponsors, Executive Steering Committee, oversight bodies and other stakeholders.</p> <p>Works with Modernization Sponsor and agency leadership to plan and coordinate resources needed to meet schedule dates.</p> <p>Works with Modernization Sponsor and agency leadership to resolve resource constraints and coordinate use of resources needed for operations or that are allocated on other agency projects.</p> <p>Participates in regular process assessments to evaluate whether processes are effective, efficient, and are being followed.</p>
<p>Modernization Schedule Project Manager</p>	<p>Develops and maintains the master program schedule.</p> <p>Develops and maintains each schedule component linked to the master program schedule.</p> <p>Develops, maintains, and manages the schedule management plan.</p> <p>Develops reports for schedule health and variance, and other reports as requested by oversight bodies.</p> <p>Works with team leads, task owners, and others on the program or project teams to incorporate task updates into the master program schedule.</p> <p>Works with the modernization team to identify, coordinate, and monitor the tasks and activities that support the schedule milestones and deliverables.</p> <p>Ensures the master program schedule has the detailed task and resource granularity to report schedule progress and schedule variance.</p> <p>Ensures the master program schedule identifies staff resources necessary to perform all scheduled activities, including additional operational resources needed as subject matter experts (SMEs), trainers, and testers.</p> <p>Reviews resource allocations for feasibility, identifies resource constraints or over allocations, and develops resource reports.</p> <p>Alerts the Modernization Program’s management team of potential resource constraints or task slippage affecting the schedule along with suggested mitigation strategies.</p>

Role	Responsibilities
Team leads	<p>Works with Modernization Schedule Project Manager to identify work, activities, and durations for designated schedule components.</p> <p>Monitors tasks and activities within their assigned schedule areas.</p> <p>Reports progress updates of work completed to Modernization Schedule Project Manager.</p> <p>Communicates any potential resource conflicts, barriers, or inability to meet due dates within assigned schedule areas.</p>
Task owners	<p>Works with Modernization Schedule Project Manager to identify work, activities, and durations for each of the assigned tasks.</p> <p>Performs the work for assigned tasks by the designated due date.</p> <p>Reports progress of work completed to Modernization Schedule Project Manager.</p> <p>Communicates barriers or inability to meet agreed upon timeframes to Modernization Schedule Project Manager related to assigned tasks.</p>
Contracted vendors	<p>Develops and maintains the vendor schedule tasks.</p> <p>Works with the Modernization Schedule Project Manager to incorporate the vendor schedule tasks within the master program schedule.</p> <p>Identifies, coordinates, and monitors the vendor tasks and activities.</p> <p>Provides progress updates on planning tasks to the Modernization Schedule Project Manager.</p> <p>Completes vendor tasks, including deliverables, by the due dates as outlined within the contract or as agreed to during development of the schedule.</p> <p>Proactively communicates issues that may impact the schedule to the Modernization Schedule Project Manager.</p>
Modernization Change Control Board	<p>Reviews and decides whether schedule-related changes should be escalated per the program's change control process.</p>
Modernization Quality and Risk Analyst	<p>Compiles and delivers budget and schedule variance reports to the agency and OSCIO.</p> <p>Monitors and facilitates management of schedule related risks.</p> <p>Conducts quality control reviews of schedule management processes.</p>
Independent quality management services (iQMS) vendor	<p>Conducts independent quality control reviews of schedule management processes.</p> <p>Incorporates independent assessment of schedule status within quality assurance reports required by the agency and OSCIO.</p>

# Schedule Approach

The Modernization Program is a multi-biennial effort that will continue until the program goals are met. Modernization will be carried out through the program’s various projects. For each project, discrete milestones will be established for key delivery dates and activities. The highest-level project milestones are also tracked as program milestones. Two distinct projects are anticipated. A project focused on unemployment insurance tax and benefits will be initiated first, followed by a workforce project initiated later as schedule concurrency and resource capacity are considered. Additional projects may be necessary as scope and delivery options are evaluated. The following timeline illustrates the estimated length of projects replacing systems supporting unemployment insurance and employment services.

**Figure 1 – Modernization Timeline**



*Note: Consider scheduling intentional stabilization and enhanced maintenance and support phases. These can be identified and included in the timeline above in a future version of this plan.*

The methods for managing the Modernization Program’s master program schedule follows Project Management Institute’s (PMI) standards as described in the Project Management Body of Knowledge (PMBOK). The master program schedule is developed and managed using a hybrid of traditional and iterative methods, ensuring that advantages of each are incorporated into each schedule component to encourage flexibility, effectively manage risk, and ensure deliverance of value throughout the life of the program.

The Modernization Schedule Project Manager is the owner of all schedule components within the master program schedule. All schedule components will be developed, maintained, and refreshed by the Modernization Schedule Project Manager as detailed in this plan in collaboration with team leads, task owners, vendors, or other staff that may be involved in the work.

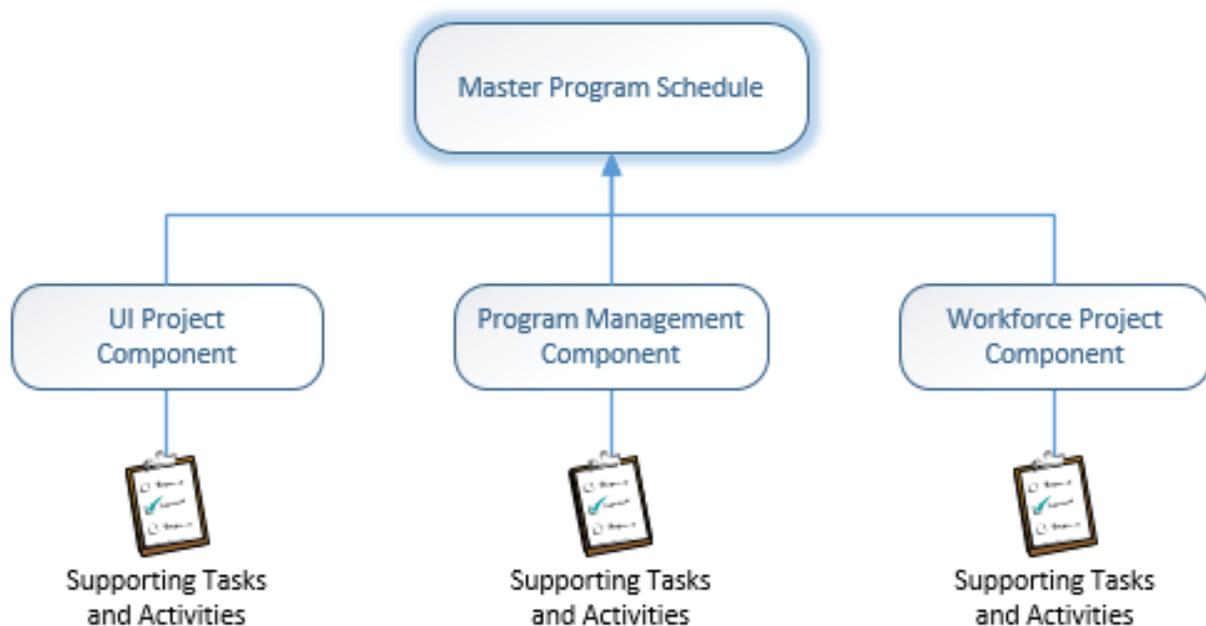
## Schedule Structure

The master program schedule is the official schedule used for all modernization projects. The master program schedule contains all schedule components, allowing for monitoring of task interdependencies, planning and allocating of resources, and reporting. The master program schedule is developed using Microsoft Project 2016, and uses the “subproject” function to insert different schedule components.

The master program schedule is comprised of the following schedule components:

- Program Management
- Unemployment Insurance (UI) Modernization Project
- Workforce Modernization Project
- Any other projects that may be chartered out of the Modernization Program

Figure 2 – Master Program Schedule Components



### PROGRAM MANAGEMENT COMPONENT

This component details the supporting work for the program administrative and operational tasks, as well as the project management services provided by the program. These services include:

- Budget management
- Communications management
- Contract management
- Procurement management
- Reporting
- Risk and issue management
- Schedule management
- Staff recruitments (program team)

Program management activities span the entire life of the program. Many of these activities are recurring each month or quarter. Recurring activities will be loaded into the schedule each year. These and other discrete activities will be further elaborated each month, ensuring that activities for the upcoming three months are planned in detail and incorporated into the schedule. While tasks within the program management schedule component will be tracked and managed, this component of the master program schedule will not be baselined.

Figure 3 – Program Management Schedule Component Example (Rolled Up)

		<b>Program Management</b>	82%	Tue 8/2/16	Wed 2/26/20	908 days
	✓	Begin program management activities	100%	Tue 11/1/16	Tue 11/1/16	0 days
		▸ Budget Management	76%	Mon 4/3/17	Tue 1/28/20	714 days
		▸ Communication Management	80%	Tue 8/15/17	Mon 1/13/20	608 days
		▸ Reporting	75%	Mon 1/2/17	Wed 2/26/20	799 days
		▸ Risk Management	75%	Mon 8/21/17	Fri 1/3/20	598 days
		▸ Schedule Management	80%	Tue 8/15/17	Wed 12/11/19	595 days
		▸ Staff Recruitments (Program Team)	89%	Tue 8/2/16	Fri 9/13/19	808 days

## PROJECT SCHEDULE COMPONENTS

There will be separate project schedule components for each modernization project. The project schedules are developed as a project and is chartered out of the Modernization Program. Project milestones, deliverables, and activities will be loaded for each major phase of the project. This ensures that needs and impacts (i.e. resources, budget, partner impacts, etc.) are sufficiently planned. Each project schedule will detail the activities specific to the project that include the deliverables, milestones, and summary-level work activities of the project team to implement and configure the solutions. These schedules will also include the work to ensure system infrastructure is prepared, legacy data is cleansed and prepared for conversion, legacy system and interface changes are completed, system testing and training is performed, and cutover activities are planned and executed.

Project schedule components will be baselined and variance reported once solution vendor work is added to the master schedule. See Schedule Baseline, Variance, and Change Control section below for more detail.

Figure 4 – Project Schedule Component Example (Rolled Up)

		<b>UI Modernization Project</b>	24%	Tue 5/1/18	Thu 1/30/25	1691 days
	✓	Begin UI Modernization project	100%	Mon 7/30/18	Mon 7/30/18	1 day
		▸ Project Management	16%	Tue 5/1/18	Thu 1/30/25	1691 days
	✓	▸ Project Initiation Phase	100%	Mon 8/6/18	Thu 2/28/19	146 days
		▸ Project Planning Phase	70%	Mon 7/30/18	Fri 2/28/20	391 days
		▸ Project Execution Phase	0%	Thu 12/5/19	Mon 11/6/23	964 days
		▸ Project Implementation	0%	Tue 9/14/21	Fri 12/30/22	319 days
		▸ Project Closing Phase	0%	Tue 11/7/23	Mon 3/11/24	90 days

## Schedule Development

Development of the master program schedule and each schedule component is the responsibility of the Modernization Schedule Project Manager. Schedule components will be developed and maintained for

specific areas of program or project work. All schedule components include milestones, deliverables, and detailed activities.

The master program schedule is developed using the following hierarchy:

- Modernization Program
  - Program Definition Phase
  - Program Preparation Phase
  - Program Delivery Phase
    - Program Management
    - UI Modernization Project
      - Project Management
        - Project Initiation
        - Project Planning
        - Project Execution
        - Project Closing
      - Workforce Modernization Project
        - Project Management
        - Project Initiation
        - Project Planning
        - Project Execution
        - Project Closing
      - [Other projects as necessary]
  - Program Closing Phase
  - Activities to Monitor

The section “Activities to Monitor” establishes a place within the master program schedule to monitor other agency projects or significant activities that may have dependencies or competition for resources. This section may be used to capture resource usage for activities that utilize program or project team resources. This section may also capture other significant agency deadlines that may impact the Modernization Program. This section is not reflected in baselines or work completed reports or graphics.

Each schedule component will be developed and managed with the appropriate level of detail to meet its purpose for reporting, dependency interaction, and performance monitoring. Initially higher level milestones, deliverables, and activities will be included to plan resources and establish the schedule baseline. Activities will be further elaborated each month, ensuring that work for the upcoming three months is confirmed and planned in detail by the Modernization Schedule Project Manager.

Once a schedule component has been drafted, the Modernization Schedule Project Manager will incorporate the information into the master program schedule and work with the team leads or task owners to identify dependencies and priorities, and to refine the activities where further detail is necessary.

The majority of activities within the master program schedule will be duration-based. For vendors who have deliverable-based contracts, it is their responsibility to submit their deliverables on time. This will also be true for the modernization team resources. Activities within all schedule components will include durations, along with estimated work hours and percentage of work complete.

Vendors, team leads, and task owners will agree to the following schedule and task requirements established for governing the level of detail and format commonality for each schedule component. These requirements provide consistency and ensure that the master program schedule can be developed and adequately managed. These requirements pertain to all schedule components and task management processes.

## SCHEDULE REQUIREMENTS

- Schedules must contain all deliverables and artifacts included in vendor contract(s). Vendor activities involving deliverables will contain the deliverable number from the contract to allow the activity to be easily located in the master program schedule.
- Activities to be performed by expanded team members or external partners will be identified so that these activities can be communicated and coordinated with other partner agencies and operational divisions within the agency.
- Activities and milestones must be broken down in enough detail to identify and maintain dependencies with work in other schedule components. The dependencies between activities spanning schedule components are maintained within the master program schedule.
- All activities within the schedule should be assigned to a specific team or individual as the task owner. While activities may have more than one participant, each activity will be assigned only one task owner. The task owner will be responsible for reporting progress, changes in scope, or task delays to their team lead or the Modernization Project Schedule Project Manager as appropriate.

## TASK REQUIREMENTS

Detailed tasks may be maintained separately outside of the master program schedule, using tools such as Microsoft Excel or other tracking applications. Although these tasks may be tracked and monitored using different tools, task management must adhere to the following requirements:

- Tasks for work within the upcoming three-month period should be broken down to increments between one day and two weeks in duration; tasks for work beyond the three-month rolling wave “look ahead” may remain at a higher level until the work is elaborated. Elaboration of tasks supporting the schedule will occur monthly, but many tasks will be identified and updated weekly as work is iteratively planned and executed.
- Tasks must have a task owner responsible for ensuring that the work is completed.
- Tasks must contain the following elements:
  - Task name
  - Category that connects the task to the activity within the master program schedule
  - Task owner
  - Percentage (%) complete
  - Identified resource(s) or team performing the work
  - Estimated task start date
  - Estimated task finish date
  - Duration in business days
  - Predecessors identified if work start or finish is dependent upon completion of other tasks

Some activities will require coordination with external partner stakeholders or operational divisions. These activities include coordination of system changes needed by external interfacing systems or testing activities to ensure data streams and system interfaces function as expected. The program will assign an agency point-of-contact to work with these external resources and coordinate scheduled activities. The point-of-contact is responsible for escalating any schedule concerns to the appropriate team lead or the Modernization Schedule Project Manager.

## Schedule Maintenance

Each month, the Modernization Schedule Project Manager works with the project team and team leads responsible for assigning the work to refine and identify tasks and due dates that are approaching in the upcoming three months. Tasks necessary for near-term milestones (within three months) will be scheduled in detail. Tasks for milestones with a longer horizon (more than three months) will be scheduled at a higher level with as much information as is known. Elaboration of tasks is a continuous process, and many tasks will be identified and updated daily or weekly as work is iteratively planned and executed.

Each month, the Modernization Schedule Project Manager will work with team leads or task owners to refine and identify tasks, as well as resources (or assigned resource teams) to complete the tasks, and estimated task completion dates that are approaching. Each schedule component will be monitored and maintained by its designated team lead or task owner, who will work with the Modernization Schedule Project Manager to accurately update the schedule, so that the master program schedule reflects the information required for schedule health reviews and reporting.

Detailed tasks and activities supporting each schedule component may be maintained separately from the master program schedule and may use different tools and formats. Tasks maintained separately must reference the activity or category from the schedule component so that tasks can then be mapped back to the schedule component and in turn to the master program schedule.

Previously unidentified or unplanned program or project work and activities may be identified by various internal or contracted staff. If the work is not within the original baselined scope, a change control decision may be necessary to determine if the work will be added to scope. Refer to the program's scope management plan and change control plan for additional details. Approved new work will be inserted into the schedule, and high-level estimates of predecessors, successors, task start/completion dates, and durations will be added.

## Schedule Monitoring and Controlling

Regular reviews of the master program schedule and schedule components will be used to assess schedule health and task performance. Weekly reviews of the master program schedule will be performed by the Modernization Schedule Project Manager to facilitate monitoring of the schedule. The Modernization Schedule Project Manager will use the information available in each schedule component to update the master program schedule. Further, these reviews will facilitate discussion and awareness of scheduling changes, performance, issues, and impacts.

### TASK MONITORING

Team leads and task owners will provide status updates on their tasks weekly, or when the work status changes. The Modernization Schedule Project Manager or designated team leads will monitor the status

of tasks weekly, so that progress against activities within the master program schedule can be assessed. Team leads are responsible for resolving any performance concerns and immediately escalating any potential slippage, variance, or changes to the Modernization Program Manager and Modernization Schedule Project Manager.

## SCHEDULE MONITORING

Each schedule component will be reviewed by the Modernization Schedule Project Manager for schedule performance in the following areas:

- Schedule milestones or activities started and/or completed within that review period
- Schedule health for activities planned for the upcoming three months
- Concerns or risks for milestones or activities planned for the upcoming three months
- Indication of any new activities or milestones added to the schedule, along with any potential impact to other activities
- Indication of any rescheduling of activities or milestones, along with an explanation of why changes were necessary

Team leads or task owners will submit more detailed updates for their respective schedule areas for activities within the master program schedule to the Modernization Schedule Project Manager at least monthly for updating. Updates will include percent complete and any expected slippage (along with new dates and reason for delay), and will identify any tasks to be added to or modified in the schedule. Each month the Modernization Schedule Project Manager will incorporate updates into the master program schedule. Schedule reports will be generated, and the schedule will be published so that the project team can review progress and plan for upcoming work.

The Modernization Schedule Project Manager will review work scheduled within the upcoming three month period and request staff to provide status updates that include the expected duration to complete the work, percent complete, and estimated completion dates. The Modernization Schedule Project Manager will update the master program schedule with the updated information and escalate any late tasks to the Modernization Program Manager. Review and updates for these components will occur weekly by the Modernization Schedule Project Manager, and status will be reported weekly to the Modernization Program Manager and all Modernization managers.

The Modernization Program Manager and Modernization Schedule Project Manager will work with the respective managers, team leads, and task owners to resolve any schedule issues and determine appropriate course corrections. Resources that are over-allocated will be reviewed, and their workload constraints will be addressed on an individual basis. The Modernization Program Manager may engage the Modernization Sponsor and Modernization managers to assist with, guide, and direct this process.

## Schedule Baseline, Variance, and Change Control

### SCHEDULE BASELINE

Schedule baselines will be established at the project level and within their respective schedule components. Although program and project management activities are tracked and managed, they do not drive the baseline reports. Changes to milestones within the master program schedule will be

reported and tracked in the program’s monthly status report. Any additional need to re-baseline must be approved through the program’s change control process. If schedule baseline changes by +/- 10%, formal approval through the program’s change control process is necessary and OSCIO must perform review and re-endorsement. See the program’s change control plan for further details on the change control process.

## SCHEDULE VARIANCE AND CHANGE CONTROL

Schedule variance is reported for any difference between the baselined dates and any expected or approved variance from that date. Additionally, any variance between baselined major milestones and deliverables is reported within the program’s monthly status report. Any activities or deliverables added to the schedule, and any unplanned variances between planned and actual start and completion dates of critical deliverables or major milestones will be reported to the Modernization Sponsor, Modernization Program Manager, and Modernization Schedule Project Manager for review to determine impacts.

Schedule health will be reported in the program’s monthly status report. The following schedule variance thresholds will be used, along with other performance factors, to determine the health of the projects. These thresholds apply to schedule delays. If the project is ahead of schedule, it will be reported as green.

**Table 2 – Schedule Variance Health Ratings**

Schedule Variance	Schedule Health
Less than 5%	Green
5% - 15%	Yellow
Above 15%	Red

## Resource Management

This section describes resource management as it pertains to schedule management only in relation to resource needs, availability, and performance. External partner resources performing work to coordinate activities or testing with the project teams (example: other state agencies, federal agencies) may also be necessary. Establishing initial milestones and key activities early will allow resource planning to occur and ensure that advance notice is given to operational areas as to when expanded team resources are needed, for what purpose, and for approximately how long. Elaboration of scheduled activities will further confirm resource needs, specific timeframes, and any adjustments in advance of scheduled work. This will allow sufficient time for operational work to be reassigned if necessary.

### AGENCY RESOURCE MANAGEMENT

Activities for agency staff allocated to modernization projects full-time are managed in accordance with the schedule. When assigning part-time resources to tasks, it is important to understand that they have other operational commitments, and these tasks must be leveled properly to allow them to perform their other tasks. Managers will be consulted to reach consensus on how much available time a part-time resource can commit to the project so that their workload is feasible. Additionally, when assigning workload, the actual hours (level of effort) necessary to complete a task will vary widely based on the resource assigned. An experienced resource may be able to complete a task in far fewer hours than a

less experienced resource. The resource must provide their work estimates, approximate start and finish date, and percentage of time available to work on a particular task, so that their tasks are scheduled accurately. Resources that have fewer hours to provide to the program or project will have longer durations for their tasks, as they have other responsibilities and less time to devote to assigned work.

Resource assignments for agency staff will be made as follows:

- For full-time team members, task assignments will be made by their team lead, based on advice and consultation with the Modernization Schedule Project Manager.
- For expanded team members, the Modernization Schedule Project Manager will work with the operational manager, outlining the specific expertise needed, estimated level of effort and the estimated start/finish dates. The operational manager will indicate the resource's availability for the work. This allows the duration of the work to flex according to work and availability.

Details regarding assignment and management of agency resources are addressed in the program's staff management plan.

## CONTRACTED RESOURCE MANAGEMENT

Contracted resources are subject to their specific contracts and deliverables. Contracted resources can operate under different contracts and produce different sets of deliverables. Resource assignments for contracted staff are determined by their respective contracts or handled by their company.

Depending on the contract, contracted resources are not as constrained by hours and level of effort. Their tasks will be managed based on their previously described task start and end dates in their individual schedules. Contracted vendors are responsible for managing their resources to ensure they meet their deliverable and milestone deadlines.

## RESOURCE AND TASK ESTIMATION

The Modernization Schedule Project Manager will work with team leads and managers to develop initial estimates for bodies of work and anticipated skillsets and agency resources needed to perform the work. Once resources are assigned and work is further decomposed, assigned resources will provide the Modernization Schedule Project Manager with updated estimates of hours or duration to complete each task. Assigned resources will be given the opportunity to later review their tasks and provide updated work estimates to complete the task, start and end dates, and percentage of time available. This will allow the Modernization Schedule Project Manager to identify resources that may be over-allocated or tasks that are in danger of causing unacceptable slippage to milestones. The Modernization Schedule Project Manager will review schedule progress with the Modernization Program Manager regularly and escalate any concerns immediately so that corrective actions can be taken (i.e. adding resources or adjusting task timelines).

## RESOURCE COMMITMENT

Any issues with resource commitment or concerns regarding resource allocation will be escalated by the Modernization Schedule Project Manager to the Modernization Program Manager for resolution. If the issue cannot be resolved, or the issue is with expanded team resources, the issue will be promptly escalated to the appropriate operational manager for resolution or to the Modernization sponsors for guidance and direction as necessary.

## Schedule Reporting and Communication

The program's communication and outreach plan describes the communications activities and methods of sharing information about project processes, events, documents, and milestones. The communications registry includes the regular communications for program and project status, including schedule reporting.

Frequent, open communication regarding the program's schedule is necessary to keep participants, agency stakeholders, and oversight entities informed, foster open dialogue, and ensure that the program proactively manages scheduled activities. In general, schedule reports are presented as part of the program status report.

The master program schedule is used to report overall program and project schedule health and any schedule variances on a monthly and quarterly basis.

### MONTHLY SCHEDULE REPORTS

Monthly schedule reports will be used to analyze dependency impacts and assess overall schedule health. The high-level rollup of the master program schedule will be incorporated within the monthly status report that is shared with the program and project teams, steering committee, any other internal or external stakeholders, and available for all agency staff to review. Additionally, these status reports may be shared with internal and external quality oversight.

At the beginning of each month, once the master program schedule has been updated, the Modernization Schedule Project Manager will prepare monthly schedule health and variance reports. The monthly program schedule reports will include:

- High-level schedule showing variance for high-level activity categories;
- Work overview showing work burn down and velocity, along with percent of work complete;
- Milestones, activities, and deliverables planned and completed that month;
- Any variance from baselined milestones and reasons why work did not meet timeline; and
- Activities and deliverables planned for the upcoming month, along with any indication whether work is on target or needs attention.

See Appendix A for examples of the schedule reports included within the program's status report.

### QUARTERLY BUDGET/SCHEDULE VARIANCE REPORT

This report is required by the OSCIO for all state major IT projects. The schedule portion of this report illustrates planned and actual milestones and notes any variance from baseline to monitor whether actions should be taken to bring a project back within acceptable schedule ranges. This report uses the OSCIO designated format, including variance threshold ranges. See Appendix B for the OSCIO quarterly budget/schedule variance report template.

## Document Maintenance

This document is maintained by the modernization team, specifically the Modernization Schedule Project Manager, and will be reviewed semi-annually to determine whether revisions are necessary. Periodic process reviews assess the effectiveness of program plans and processes. Any identified changes or improvements are incorporated in program processes and reflected within revisions to these program plans. All program plans are stored within the program's file share located here:

<\\WPOEDFILL04\014\Shared\00 Program Management\Program Plans>

Version	Date	Author	Change Description
V1.0	12/2018	Jenny King, Modernization Project Manager	Initial version of the document.
V2.0	7/2019	Jen Sullivan, Modernization Schedule Project Manager Jennifer Hannan, Modernization Program Manager	Added document relationship section, made adjustments throughout to address editorial changes and corrections to accurately reflect current process.

## Approving Authorities

*Ethan Benatan*

Ethan Benatan (Sep 3, 2019)

Ethan Benatan, Modernization Sponsor  
Modernization Director

Date

*Jennifer Hannan*

Jennifer Hannan (Sep 4, 2019)

Jennifer Hannan, Modernization Program Manager

Date

*Jen Sullivan*

Jen Sullivan (Sep 4, 2019)

Jen Sullivan, Modernization Schedule Project Manager

Date

## Appendix A – Monthly Schedule Report Examples

### Activities and Deliverables

#### MODERNIZATION PROGRAM ACTIVITIES

ACTIVITIES AND DELIVERABLES SCHEDULED FOR JULY	STATUS	ACTIVITIES AND DELIVERABLES SCHEDULED FOR AUGUST	STATUS
Prepare budget report 2019-06	✓	Prepare budget report 2019-07	
Conduct budget meeting 2019-07	✓	Conduct budget meeting 2019-08	
Plan and conduct communications 2019-07	✓	Finalize key messages supporting statements (moved from June)	89%
Finalize key messages supporting statements (moved to August)	89%	Plan and conduct communications 2019-08	
Conduct UI manager meeting (Bend) 2019-07	✓	Conduct UI manager meeting (Beaverton) 2019-08	
Prepare program status report 2019-07	✓	Prepare program status report 2019-07	
Conduct ESC meeting 2019-07	✓	Conduct monthly ESC meeting 2019-08	
Complete budget management plan refresh (moved to August)	63%	Complete budget management plan refresh (moved from July)	63%

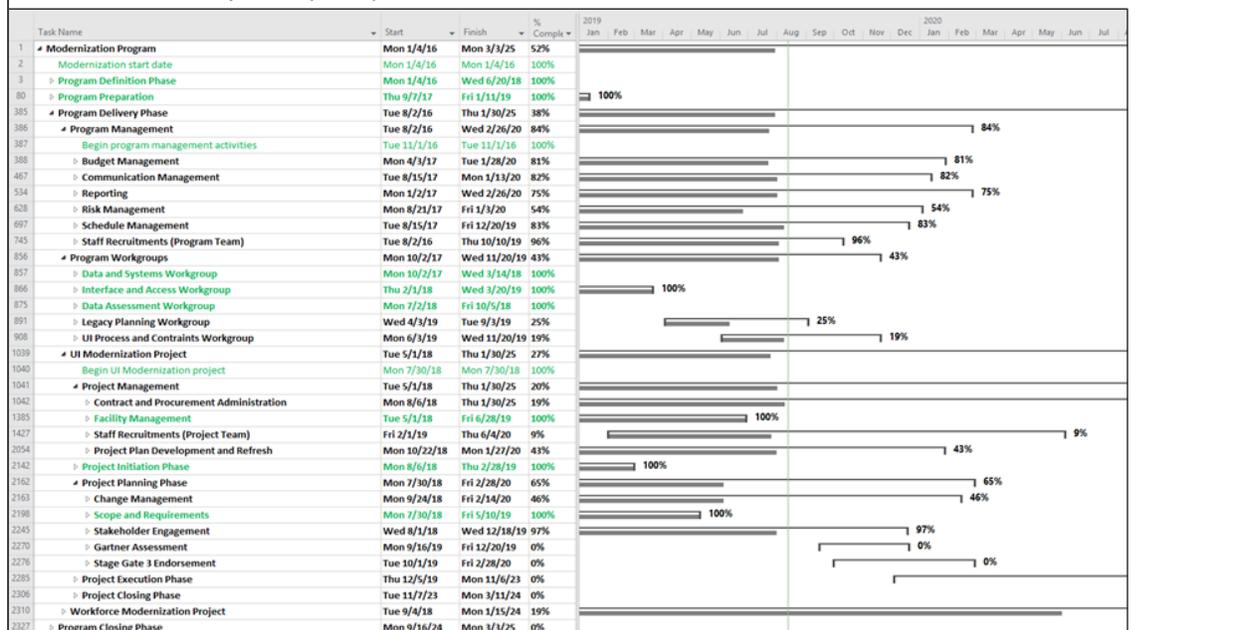
#### UI MODERNIZATION PROJECT ACTIVITIES

ACTIVITIES AND DELIVERABLES SCHEDULED FOR JULY	STATUS	ACTIVITIES AND DELIVERABLES SCHEDULED FOR AUGUST	STATUS
Develop OCM procurement plan (moved from March)	✓	Complete UI solution RFP development	
CSG submit D3.1.1 QC Review RFP	✓	Post UI solution RFP	
Accept CSG D3.1.3 QC Review Solution Requirements	✓	CSG submit D1.1.1 Initial Risk Assessment	
CSG submit D3.1.5a QC Review PMP Group 1	✓	Accept CSG D3.1.1 QC Review Solution RFP	
Accept CSG D3.1.5a QC Review PMP Group 1	✓	Finalize business team hiring plan	
OED submit PMP group 2 plans for CSG QC review (postponed – TBD)	–	Post recruitment for technical manager	

### Schedule Report

Schedule rating for the UI Modernization Project improved to green. The UI solution procurement timeline has been finalized and the anticipated start date with a UI solution vendor has moved to August 2020. Activities dependent upon, or that must be conducted in parallel with completion of the UI solution procurement are now being adjusted. The Modernization Schedule Project Manager continues to refine the program schedule to improve process and task clarity so we can proactively manage capacity, performance, and progress to achieve milestones.

#### SUMMARY SCHEDULE (as of July 2019)



## Appendix B – Quarterly Budget/Schedule Variance Report Template

<b>Budget and Schedule Variance</b>											
<b>Employment Department - Modernization Program</b>											
		<b>Budget Variance</b>									
		<b>Current Budget Variance</b>			<b>Projected Budget Variance at Completion</b>						
<b>Project</b>	<b>Report as of Date</b>	<b>Actual Expenditures</b>	<b>Planned Expenditures</b>	<b>Variance Amount</b>	<b>Variance Percentage</b>	<b>Date Baseline Occurred</b>	<b>Baseline Budget</b>	<b>Estimate At Complete</b>	<b>Variance Amount</b>	<b>Variance Percentage</b>	<b>Comments</b>
Project A				\$ -	#DIV/0!				\$ -	#DIV/0!	
Project B				\$ -	#DIV/0!				\$ -	#DIV/0!	
Project C				\$ -	#DIV/0!				\$ -	#DIV/0!	
Project D				\$ -	#DIV/0!				\$ -	#DIV/0!	
				<b>Budget Variance Key</b>							
				At or under Original or Re-baselined Cost Estimate							
				Within 0-15% of Original or Re-baselined Cost Estimate							
				More than 15% of Original or Re-baselined Cost Estimate							
		<b>Schedule Variance</b>									
		<b>Current Schedule Variance</b>			<b>Projected Schedule Variance at Completion</b>						
<b>Project</b>	<b>Project Start Date</b>	<b>Actual Date</b>	<b>Earned Date</b>	<b>Variance Amount (Days)</b>	<b>Variance Percentage</b>	<b>Date Baseline Occurred</b>	<b>Baseline End Date</b>	<b>Projected End Date</b>	<b>Variance Amount (Days)</b>	<b>Variance Percentage</b>	<b>Comments</b>
Project A				0	#DIV/0!				0	#DIV/0!	
Project B				0	#DIV/0!				0	#DIV/0!	
Project C				0	#DIV/0!				0	#DIV/0!	
Project D				0	#DIV/0!				0	#DIV/0!	
				<b>Schedule Variance Key</b>							
				At or under Original or rebaselined schedule							
				0-15% of Original or rebaselined schedule							
				More than 15% of Actual or Baseline Date							

# Modernization Schedule Management Plan V2.0

Final Audit Report

2019-09-04

Created:	2019-09-03
By:	Lynn Kneeland (lynn.kneeland@oregon.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAA8MT3LM_F0P20pWpMIPfDonN43zvU7bt0

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2019-09-04 - 4:28:12 AM GMT- IP address: 159.121.204.129
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2019-09-04 - 3:17:58 PM GMT