Portland State
UNIVERSITY

# ABC Enrollment & Transfer Center Proposal – Set III

Course Title: ETM 510 – Project Planning and Implementation

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# Project Charter

**Project Title**: **ABC Enrollment & Transfer Center**

**Project Start Date: 06/30/2011 Projected Finish Date: 12/31/2011**

**Project Manager:** Team 1, xxxxxxxxx

**Budget Information: $1,521,140**

**Project Objectives:**

As a result of lack of state and federal funding ETC department is facing staff cuts. We will review current services and propose implementation of new business processes in order to ensure that reductions in services do not affect the overall goals of the district.

**Project Success Criteria:**

- The project aims to automate various processes,such as; filling an application, updating the database and data retrieval.
- Time, cost and quality metrics and effort estimation models will be implemented.
- Develop list of priority services aligned with district goals.
- Streamline operations within 3 months such that current levels of service can be maintained despite reduction in available resources.
- Shorten processing time after automation of enrollment and transfer services.

**Deliverables:**

**Phase 1: Analysis**

In this phase the project management team will analyze the current ETC services. The resulting report should include information on services that are most clearly aligned with the District goals. Opportunities that improve efficiencies in priority services need to be identified.

**Phase 2: Implementation Plan**

The project team must develop an implementation plan that encompasses the changes recommended in phase 1. This plan needs to address not only which services are being modified and which are new, but also the policy and procedural changes outside the department that will be needed following departmental changes.

The resulting report should provide a prioritized list of recommendations.

**Approach:**

1) Collect user requirements and document it as requirement analysis for user review.
2) Write corresponding use cases to cover requirements.
3) Prepare system architecture design for user review.
4) Develop a detailed design document for major components for new scenarios to be implemented.
5) Unit testing, regression testing, and system integration testing will be used during project implementation.
6) QA testing and user acceptance testing will be done as a part of the quality assurance phase.

7) Final user acceptance testing will be done prior to the final release of the project

**Project Communication Plan:**

The Project Team Communications Plan document will be used to define and communicate the plan. The Project Manager is responsible for establishing and maintaining the plan. These should include: reporting, meetings, notices and team building.

The communication plan will include -

1. Developing a process for soliciting employee input (questionnaire, interview, observation, study current business process)
2. Providing reports on the results of the system analysis
3. Making recommendations to the senior management about preferred solutions.

**Project Reporting:**

- Project Meeting – Agenda
- Project Meeting – Minutes
- Project Action items – Open
- Project Action Items – Closed
- Project Issue Management Form
- Project Issue Management Log
- Project Weekly Time Tracking – Employee
- Project Weekly Time Tracking – Summary
- Project Status Report

**Assumptions/Constraints/Risks:**

General funds have been severely impacted by budget cuts. The ETC just cut 1.5 general funded positions for the 2011-12 fiscal year so it is unlikely that any of the grant funded positions will be converted to general funded positions. This means any solution has to come in the form of efficiency improvements rather than staffing allocations.

It is crucial to make sure that any changes will promote a transfer process that is consistent with broader district goals and promote student achievement.

**Project Wrap Up:**

The Project Wrap-up will include Report prepared by the Project Manager after user acceptance testing. Prior to this report, an interview process will be conducted to create the Project Lessons Learned document. All the major activities during project implementation will be rated by the participants and a summary report will be prepared for all the responses. The Lessons Learned Report will also include projects highs and lows for major activities, along with the recommendations for future projects.

# Business Case

**1.0 Introduction/ Background**

The Enrollment and Transfer Center (ETC) is a department of ABC responsible for managing the transfer requests of students in and out of most ABC schools, as well as supporting the routine enrollment process of all new ABC students. The ETC provides a variety of transfer services, including those required by federal, state and local policies. Altogether, the ETC processes approximately 6,000 transfer requests each year. A grant that funds 2.75 employees is set to expire in September 2012. It is unlikely that additional funding will be found.

**2.0 Business Objective**

In light of imminent staff cuts the department faces, ETC services must be reviewed and a new business process implemented to ensure that reductions in service are focused on preserving the activities that best support the overall goals of the district.

**3.0 Current Situation and Problem/Opportunity Statement**

There are currently 10 full-time and one part-time (.75) employees in the department. A grant that funds 2.75 employees is set to expire in September 2012. This means the ETC department will be left with 8 employees to cover the work previously done by 10.75 employees.

**4.0 Critical Assumption and Constraints**

General funds have been severely impacted by budget cuts. The ETC just cut 1.5 general funded positions for the 2011-12 fiscal year so it is unlikely that any of the grant funded positions will be converted to general funded positions. This means any solution has to come in the form of efficiency improvements rather than staffing allocations.

It is crucial to make sure that any changes will promote a transfer process that is consistent with broader district goals and promote student achievement.

**5.0 Analysis of Option and Recommendation**

1.) Do nothing. If nothing is done the ETC department is going to become overloaded. This will lead to a backlog in transfer requests. This is an undesirable outcome. Parents need to know what school their children will attend before the start of the school year.
2.) Develop a plan that allows the smaller ETC group to maintain their critical outputs.

**6.0 Preliminary Project Requirements**

There are two main deliverables for this project that are broken into two phases.

Phase 1: Analysis

In this phase the project management team will analyze the current ETC services. The resulting report should include information on services that are most clearly aligned with the District goals. Opportunities that improve efficiencies in priority services need to be identified.

Phase 2: Implementation Plan

The project team must develop an implementation plan that encompasses the changes recommended in phase 1. This plan needs to address not only which services are being modified and which are new, but also the policy and procedural changes outside the department that will be needed following departmental changes.

The resulting report should provide a prioritized list of recommendations.

**7.0 Budget Estimate and Financial Analysis**

A preliminary budget estimate suggests that a ROI of 130% can be achieved. This return assumes that the changes will produce the estimated cost savings. The NPV of $16,805 has a payback period of approximately 2 months.

**8.0 Schedule Estimate**

The analysis period will take time due to collect surveys and conducting interviews. During that time the cost models will be developed. After making recommendations the bulk of the time will be in implementing the new systems and teaching personnel. The total duration was estimated at 4 months in the financial analysis.

**9.0 Potential Risks**

There are a number of potential risks. One is that there won't be funding available to make the changes needed. This is a large risk since the biggest problem facing the department now is funding. Next is that the changes needed will exceed the estimated duration. Finally the ABC has to buy off on the suggested changes.

**10.0 Exhibits**

Exhibit A: Financial Analysis

## Proposed Personnel

| Name | Role | Position | Communication and correspondence information. |
|---|---|---|---|
| Superintendent | Sponsor | Superintendent | |
| ETC Director | Sponsor | ETC Director | |
| VPSC Grant | Funding source | VPSC Grant | |
| Kathy | Advisor | | abc@abc.com |
| Chief clerk | How they receive and file info from applicants | Chief clerk | |
| Placement specialist | Provide info on how placement is carried out | Placement specialist | |
| Technical analyst | Review of the current information system | Technical analyst | |
| Data analyst | Review of the current information system | Data analyst | |

| | | | |
|---|---|---|---|
| DJ | | Project manager | abc@abc.com |
| AA | | Team Lead | abc@abc.com |
| GU | | Business systems analyst | abc@abc.com |
| LK | | System Integration Specialist | abc@abc.com |
| DM | | System Data Analyst | abc@abc.com |
| Parent group | For interview | | |
| PTA – parent teachers association | For interview | | |
| Portland teachers association | For interview | | |
| Principals association | | | |
| School board | Policy Maker | | |
| Mayor of Portland | | | |
| Community members. | | | |
| Families | | | |
| Students | | | |
| District staff | | | |
| Representatives of the City of Portland | | | |
| Stationery Supplier | | | |

## Team Contract

**Project Name: ABC Enrollment & Transfer Center**

**Project Team Members Names and Sign-off:**

| Name | Sign-off on Team Contract |
|---|---|
| Niharika Jeena | Niharika Jeena 6/29/2011 |
| Rafael Colon | Rafael Colon 6/29/11 |
| Aron Yucha | Aron E. Yucha – 6/29/2011 |
| Marty Flansburg | Marty J Flansburg 6/29/11 |
| | |
| | |

**Code of Conduct:** As a project team, we will:

- Work proactively and efficiently towards the completion of project
- Work together to anticipate and prevent problems
- Work honestly within our capabilities
- Prepare meeting minutes so that all the team members will always be informed
- Respect one another through: Culture Awareness, Professional Demeanor, understand culture shock, perceive experience, respect our neighbors, realize confidential information
- Accept Responsibility by: accepting assignments and ensuring integrity
- Accept Fairness by avoiding favoritism and discrimination against others, avoiding and reporting conflict of interest situations among (team members, stakeholders, affiliations & associations), and maintaining impartiality in our decision making process

**Participation:** We will:

- Every stakeholder should make sure they understand what their responsibilities/expectations are within a the given project
- Be open to new ideas and encourage active participation among team members
- Let project manager know about absence or presence in advance
- Let project manager know about task status( in process/delayed/completed) in advance

**Communication:** We will:

- Maintain open/dynamic/fluid lines of communication among all stakeholders ensuring all information, documentation, and plans are realized and shared
- Develop, plan, execute a communication plan

- Respect different communication styles among all stakeholders
- Concentrate on solving problems
- Present ideas clearly and concisely
- Use visual means such PPTs, charts, tables to facilitate the discussion to keep all team members on the same pace
- Keep all discussion on track
- To keep stakeholders informed, prepare status reports and progress reports

**Problem Solving:** We will:

- Invite suggestions from all stakeholders and be open to each idea
- Always use constructive criticism
- Escalation procedure will be created to manage conflicts in team and project

**Meeting Guidelines:** We will:

- Always prepare an agenda before meeting
- Send meeting minutes within 24 hours of project meetings
- Rotate responsibility to record meeting minutes
- Document all major issues and solutions and send them to project sponsor and team members via email

## Stakeholder Register

| Name | Role | Internal/ External | Position | Communication and correspondence information. |
|---|---|---|---|---|
| ETC Director | Project Sponsor, acceptance of project charter, policy change procedures, Inform stakeholders of policy change procedures | Internal | ETC Director | |
| Chief clerk | Identify data collection medium | Internal | Chief clerk | |
| Placement specialist | List current ECT activities | Internal | Human resource | |
| Technical analyst | Review of the current information system | Internal | Technical analyst | |
| Data analyst | Review of the current information system | Internal | Data analyst | |
| Chief of staff | Assign resources to the tasks | Internal | Human resource | |
| App Developer | Institute software changes | External | App Developer | |
| Supplier | Supply the required equipment | External | Supplier | |

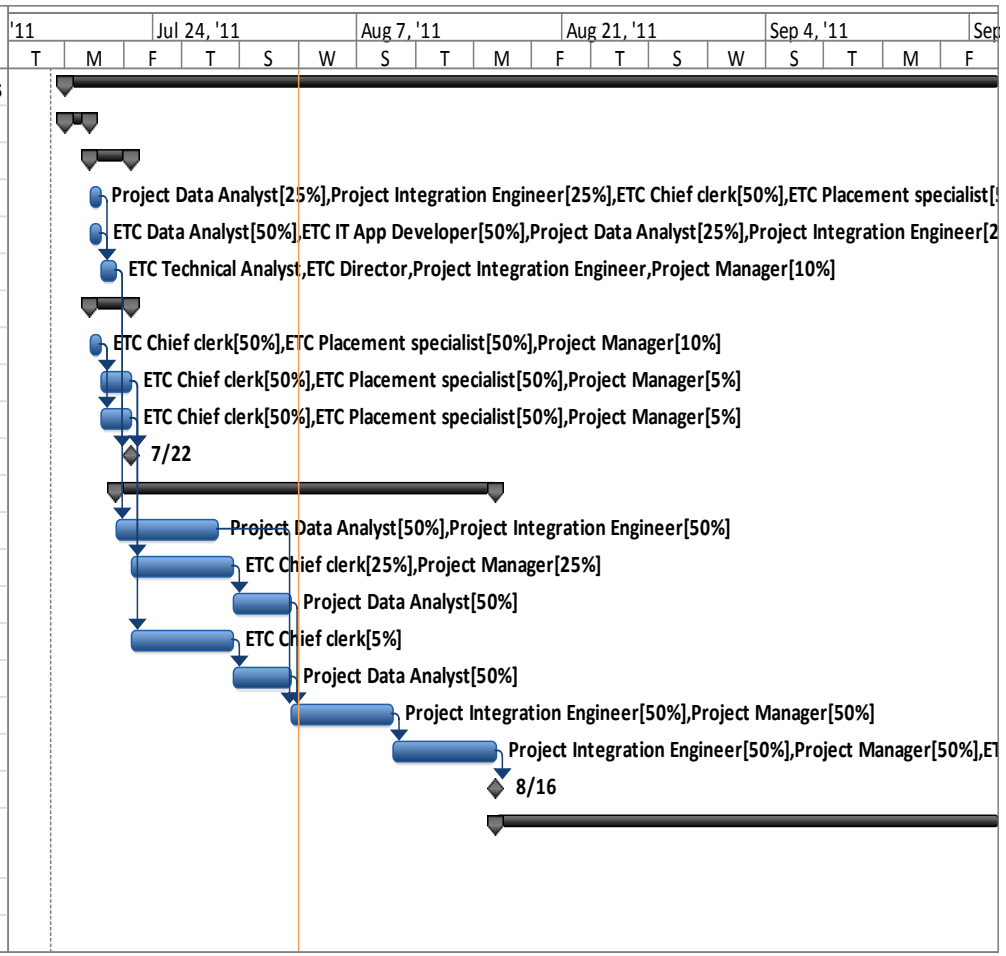
## Stakeholder Management Strategy

| Name | Role | Internal/External | Level of interest | Level of influence | Potential management strategy |
|---|---|---|---|---|---|
| ETC Director | Project Sponsor, acceptance of project charter, policy change procedures, Inform stakeholders of policy change procedures | Internal | High | high | |
| Chief clerk | Identify data collection medium | Internal | High | low | |
| Placement specialist | List current ECT activities | Internal | | Low | |
| Technical analyst | Review of the current information system | Internal | High | Low | |
| Data analyst | Review of the current information system | Internal | High | Low | |
| Chief of staff | Assign resources to the tasks | Internal | High | Low | |
| App Developer | Institute software changes | External | High | low | |
| Supplier | Supply the required equipment | External | High | low | Will get market for equipment |

# Gantt Chart

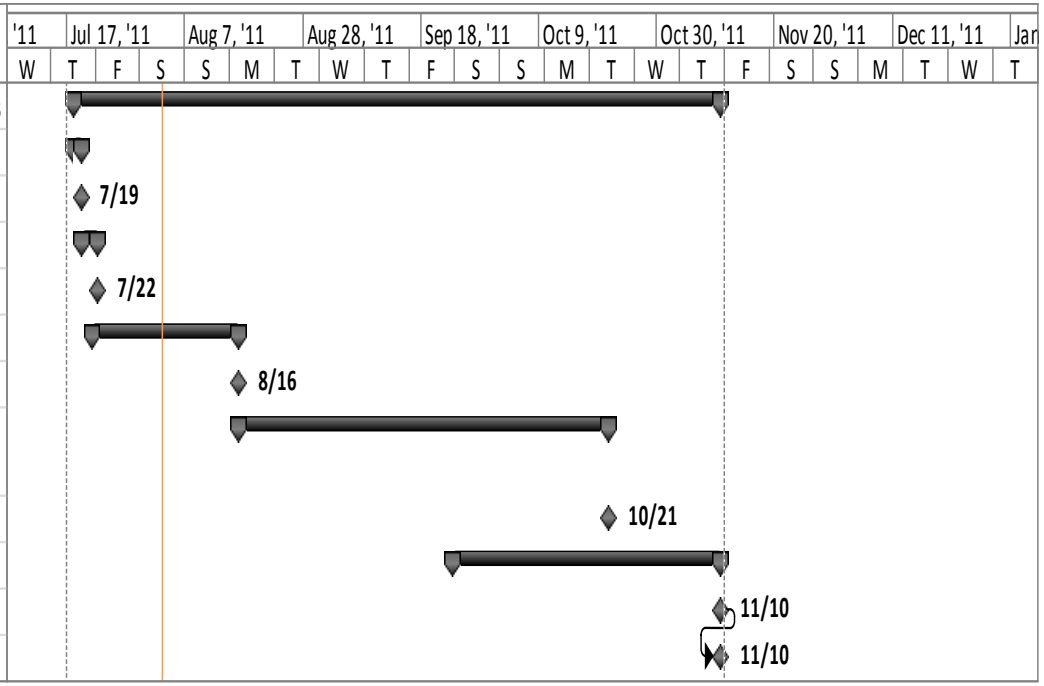
## Cost / Resources

| ID | Task Mod | Task Name | Cost | Duration |
|---|---|---|---|---|
| 1 | | **1 PPS ECT Project** | **$35,017.67** | **83.25 days** |
| 2 | | **1.1 Initiating Phase (Information gathering)** | **$1,173.40** | **1.75 days** |
| 7 | | **1.2 Planning Phase (Listing / Identifying resources** | **$1,665.46** | **2.5 days** |
| 8 | | 1.2.1 List current ECT activities | $102.50 | 0.5 days |
| 9 | | 1.2.2 List current ECT software | $274.04 | 0.5 days |
| 10 | | 1.2.3 Define cost analysis criteria | $842.32 | 1 day |
| 11 | | **1.2.4 Define people data** | **$446.60** | **2.5 days** |
| 12 | | 1.2.4.1 Identify data collection medium | $57.32 | 0.5 days |
| 13 | | 1.2.4.2 Develop surveys | $194.64 | 2 days |
| 14 | | 1.2.4.3 Write interview questions / outline | $194.64 | 2 days |
| 15 | | 1.2.5 Completed Planning Phase | $0.00 | 0 days |
| 16 | | **1.3 Executing Phase (Phase 1: Analysis)** | **$5,458.00** | **18 days** |
| 17 | | 1.3.1 Perform cost analysis | $1,250.00 | 1 wk |
| 18 | | 1.3.2 Conduct inteviews | $533.00 | 1 wk |
| 19 | | 1.3.3 Summarize interview data | $230.80 | 2 days |
| 20 | | 1.3.4 Send out surveys | $20.00 | 1 wk |
| 21 | | 1.3.5 Summarize survey data | $230.80 | 2 days |
| 22 | | 1.3.6 Identify areas of improvement | $1,539.00 | 1 wk |
| 23 | | 1.3.7 Identify needed policy changes | $1,654.40 | 1 wk |
| 24 | | 1.3.8 Completed Executing Phase | $0.00 | 0 days |
| 25 | | **1.4 Monitoring & Controlling Phase (Phase 2: Develop Implementation Plan)** | **$19,739.93** | **48 days** |
| 35 | | **1.5 Closing Phase** | **$6,980.88** | **34 days** |
| 40 | | **1.6 Completed PPS ECT Project** | $0.00 | 0 days |



## Milestones

| ID | Task Mod | Task Name | Cost | Duration |
|---|---|---|---|---|
| 1 | | **1 PPS ECT Project** | **$35,017.67** | **83.25 days** |
| 2 | | **1.1 Initiating Phase (Information gathering)** | **$1,173.40** | **1.75 days** |
| 6 | | 1.1.4 Completed Initiating Phase | $0.00 | 0 days |
| 7 | | **1.2 Planning Phase (Listing / Identifying resources** | **$1,665.46** | **2.5 days** |
| 15 | | 1.2.5 Completed Planning Phase | $0.00 | 0 days |
| 16 | | **1.3 Executing Phase (Phase 1: Analysis)** | **$5,458.00** | **18 days** |
| 24 | | 1.3.8 Completed Executing Phase | $0.00 | 0 days |
| 25 | | **1.4 Monitoring & Controlling Phase (Phase 2: Develop Implementation Plan)** | **$19,739.93** | **48 days** |
| 34 | | 1.4.3 Completed Monitoring & Controlling Phas | $0.00 | 0 days |
| 35 | | **1.5 Closing Phase** | **$6,980.88** | **34 days** |
| 39 | | 1.5.4 Completed Closing Phase | $0.00 | 0 days |
| 40 | | **1.6 Completed PPS ECT Project** | $0.00 | 0 days |




NOTE: All salary information was gathered at www.GlassDoor.com

## Financial Analysis

| Discount Rate: | 0.0136 | | | | |
|---|---|---|---|---|---|
| **Period (Months)** | **0** | **3** | **6** | **9** | **Total** |
| **Costs** | $ 6,358.63 | $ 15,854.22 | $ 60,520.14 | $ 11,554.53 | $ 94,287.51 |
| **Discount Factor** | 1 | 0.96 | 0.92 | 0.89 | $ 3.77 |
| **Discounted Costs** | $ 6,358.63 | $ 15,220.05 | $ 55,678.52 | $ 10,283.53 | $ 87,540.73 |
| | | | | | $ - |
| **Benefits** | $ 36,772.13 | $ 28,600.54 | $ 28,600.54 | $ 28,600.54 | $ 122,573.75 |
| **Discount Factor** | 1 | 0.96 | 0.92 | 0.89 | $ 3.77 |
| **Discounted Benefits** | $ 36,772.13 | $ 27,456.52 | $ 26,312.50 | $ 25,454.48 | $ 115,995.63 |
| | | | | | $ - |
| **Discounted Benefits - Discounted Costs** | $ 30,413.51 | $ 12,236.47 | $ (29,366.03) | $ 15,170.95 | $ 28,454.90 |
| **Cumulative Discounted Benefits - Discounted Costs** | $ 30,413.51 | $ 12,236.47 | $ (29,366.03) | $ 15,170.95 | $ 28,454.90 |

| | |
|---|---|
| **ROI:** | 33% |
| **NPV:** | $ 28,454.90 |
| **Payback Duration:** | ~ 7 Months |

| **Project Cost** | Cost/Unit/Hr. | PM (# Units /Hrs.) | SDA (# Units /Hrs.) | SIS (# Units /Hrs.) | BSA (# Units /Hrs.) | TL (# Units /Hrs.) | Subtotals | Category Totals | % of Total |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | |
| **1. Group One Human Resources** | | | | | | | | | |
| 1.1 System Data Analyst (SDA) | $37.51 | | | | | | | | |
| 1.2 System Integration Specialist (SIS) | $37.51 | | | | | | | | |
| 1.3 Business systems analyst (BSA) | $37.51 | | | | | | | | |
| 1.4 Team Lead (TL) | $43.75 | | | | | | | | |
| 1.5 Project manager (PM) | $56.29 | | | | | | | | |
| **2. Initiating Phase (Information gathering)** | **14 hours** | | | | | | | | |
| 2.1 Contact / Inteview SME | 4 | | | | | | | | |
| 2.2 Read RFP | 2 | | | | | | | | |
| 2.3 Read provided documentation | 8 | | | | | | | | |
| 2.4 Completed Initiating Phase | 0 | | | | | | | | |
| **3. Planning Phase (Listing / Identifying resources)** | **72 hours** | | | | | | | **$ 6,358.63** | **7%** |
| 3.1 List current ECT activities | 4 | 4.00 | | 2.00 | 2.00 | 4.00 | $ 550.16 | | |
| 3.2 List current ECT software | 4 | 4.00 | | 2.00 | | 4.00 | $ 475.15 | | |
| 3.3 Define cost analysis criteria | 8 | 8.00 | 2.00 | 2.00 | 4.00 | 4.00 | $ 925.34 | | |
| 3.4 Define people data | 20 | 20.00 | 16.00 | | 4.00 | 5.00 | $ | | |

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | 2,094.63 | | |
| 3.5 Identify data collection medium | 4 | 4.00 | 4.00 | | | 2.00 | $ 462.67 | | |
| 3.6 Develop surveys | 16 | 8.00 | | | 8.00 | 4.00 | $ 925.34 | | |
| 3.7 Write interview questions / outline | 16 | 8.00 | | | 8.00 | 4.00 | $ 925.34 | | |
| 3.8 Completed Planning Phase | 0 | | | | | | | | |
| **4. Executing Phase (Phase 1: Analysis)** | **232 hours** | | | | | | | **$ 15,854.22** | **17%** |
| 4.1 Perform cost analysis | 40 | 20.00 | 5.00 | | 20.00 | 25.00 | $ 3,157.05 | | |
| 4.2 Conduct inteviews | 40 | 10.00 | | 20.00 | | 5.00 | $ 1,531.73 | | |
| 4.3 Summarize interview data | 16 | 4.00 | 12.00 | | 10.00 | 5.00 | $ 1,269.00 | | |
| 4.4 Send out surveys | 40 | 10.00 | | 30.00 | | | $ 1,688.05 | | |
| 4.5 Summarize survey data | 16 | 4.00 | 12.00 | | 10.00 | 5.00 | $ 1,269.00 | | |
| 4.6 Identify areas of improvement | 40 | 20.00 | 10.00 | 5.00 | 30.00 | 15.00 | $ 3,469.70 | | |
| 4.7 Identify needed policy changes | 40 | 20.00 | 10.00 | 5.00 | 30.00 | 15.00 | $ 3,469.70 | | |
| 4.8 Completed Executing Phase | 0 | | | | | | | | |
| **5. Monitoring & Controlling Phase (Phase 2: Develop Implementation Plan)** | **928 hours** | | | | | | | **$ 60,520.14** | **64%** |
| 5.1 Determine modification methods | 64 | 40.00 | 25.00 | 30.00 | 64.00 | 20.00 | $ 7,589.60 | | |
| 5.2 Rank implementation results | 8 | | 8.00 | | 8.00 | | $ 600.08 | | |

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 5.3 Generate analysis report with change recommendations | 24 | 16.00 | 24.00 | 10.00 | 24.00 | 10.00 | $ 3,513.38 | | |
| 5.4 Achieve acceptance of plan | 24 | 20.00 | | | | 10.00 | $ 1,563.25 | | |
| 5.5 Assign responsibility for tasks | 8 | 8.00 | | | | 8.00 | $ 800.28 | | |
| 5.6 Implement changes | 320 | 120.00 | 120.00 | 120.00 | 120.00 | | $ 20,256.60 | | |
| 5.7 Institute software changes | 320 | 100.00 | | 220.00 | | | $ 13,880.10 | | |
| 5.8 Initiate policy change procedures | 160 | 120.00 | | 20.00 | | 110.00 | $ 12,316.85 | | |
| 5.9 Completed Monitoring & Controlling Phase | 0 | | | | | | | | |
| **6. Closing Phase** | **192 hours** | | | | | | | **$ 11,554.53** | **12%** |
| 6.1 Train employees on new software | 80 | 10.00 | | 80.00 | 10.00 | 10.00 | $ 4,375.80 | | |
| 6.2 Inform stakeholders of policy change procedures | 80 | 60.00 | | 10.00 | 20.00 | 20.00 | $ 5,377.45 | | |
| 6.3 Offer continued services | 32 | 32.00 | | | | | $ 1,801.28 | | |
| 6.4 Completed Closing Phase | 0 | | | | | | | | |
| **Total Duration (Months):** | **9** | | | | | **Total:** | **$ 94,287.51** | | |
| | | | | **Project Total Bid (30% M & C Reservers):** | | | **$ 122,573.76** | | |

Financial Analysis Notes Set 2 – 3:

| |
|---|
| **"Discount Rate and Wages are Local/Region Sensitive (Wa.) " - Financial Analysis has been modified to become more aligned with WBS and other Project documents** |
| **Bureau of Economic Analysis 2010-2011 (Wa.) "Q2" GDP Deflator Rate/Index**<br>Wa. GDP = 1.7 National GDP = 3.7<br>**Bureau of Labor Statistics 2010-2011 (Wa.) "Q2"**<br>CPI = **.04** (Wa Consumer Price Index) EPI = **.044** (Wa Employment Price Index)<br>**Annual Discount Rate = ((.017 + .037 + .04 + .044)/4) + (2 points - uncertainty) = .0545 (5.45%) //////// Quarterly Discount Rate = (.0545 / 4) = .0136 (1.36%)** |
| **Indexed Wages were pulled from GlassDoor.com website, Estimated Durations are hypothetical and are not representative.** |
| Wages found in Project Cost Estimate are indexed wages increased by 30% to cover employee benefits, compensation, insurance, union dues…<br>***The discount rate has been increased two points due to uncertainty, DR and Wage data neglect: additional local economic indicators, assumes current quarter rates will hold constant,<br>neglects time value of money charts/tables/indexes, neglects parametric estimating tools for wages which may include additional buffer variables…*** |
| ***The financial analysis was broken into a four phase payment schedule:<br>> Month (0) - an initial 30% of Project Bid (funds to begin project)<br>> Month (3, 6, 9) - three equal payments of remaining project bid balance (= ($122,573.76-$36,772.13)/3 = **$28,600.54**) |

Financial Analysis Sources:

| |
|---|
| Set 2: Bureau of Economic Analysis, Bureau of Labor Statistics, Whitehouse.gov |

# Resource Usage Report

Resource Usage as of Mon 8/1/11
WBS - PPS Enrollment & Transfer 2007

| | Jul 17, '11 | Jul 24, '11 | Jul 31, '11 | Aug 7, '11 | Aug 14, '11 | Aug 21, |
|---|---|---|---|---|---|---|
| Project Manager | 14.3 hrs | 8.5 hrs | 15 hrs | 20 hrs | 7 hrs | |
| Contact / Inteview SME | 4 hrs | | | | | |
| Read RFP | 2 hrs | | | | | |
| Read provided documentation | 4 hrs | | | | | |
| Define cost analysis criteria | 0.8 hrs | | | | | |
| Identify data collection medium | 0.4 hrs | | | | | |
| Develop surveys | 0.8 hrs | | | | | |
| Write interview questions / outline | 0.8 hrs | | | | | |
| Conduct inteviews | 1.5 hrs | 8.5 hrs | | | | |
| Identify areas of improvement | | | 15 hrs | 5 hrs | | |
| Identify needed policy changes | | | | 15 hrs | 5 hrs | |
| Rank implementation results | | | | | 2 hrs | |
| Achieve acceptance of plan | | | | | | |
| Inform stakeholders of policy change procedures | | | | | | |
| Offer continued services | | | | | | |
| Project Integration Engineer | 27 hrs | 13 hrs | 15 hrs | 20 hrs | 31 hrs | |
| Contact / Inteview SME | 4 hrs | | | | | |
| Read RFP | 2 hrs | | | | | |
| Read provided documentation | 4 hrs | | | | | |
| List current ETC activities | 1 hr | | | | | |
| List current ETC software | 1 hr | | | | | |
| Define cost analysis criteria | 8 hrs | | | | | |
| Perform cost analysis | 7 hrs | 13 hrs | | | | |
| Identify areas of improvement | | | 15 hrs | 5 hrs | | |
| Identify needed policy changes | | | | 15 hrs | 5 hrs | |
| Rank implementation results | | | | | 4 hrs | |
| Generate analysis report with change recommendations | | | | | 22 hrs | |
| Project Data Analyst | 19 hrs | 19 hrs | 10 hrs | | 26 hrs | |
| Contact / Inteview SME | 4 hrs | | | | | |
| Read RFP | 2 hrs | | | | | |
| Read provided documentation | 4 hrs | | | | | |
| List current ETC activities | 1 hr | | | | | |
| List current ETC software | 1 hr | | | | | |
| Perform cost analysis | 7 hrs | 13 hrs | | | | |
| Summarize interview data | | 3 hrs | 5 hrs | | | |
| Summarize survey data | | 3 hrs | 5 hrs | | | |
| Rank implementation results | | | | | 4 hrs | |
| Generate analysis report with change recommendations | | | | | 22 hrs | |
| ETC Director | 12 hrs | | | | | |
| Contact / Inteview SME | 4 hrs | | | | | |
| Define cost analysis criteria | 8 hrs | | | | | |
| Achieve acceptance of plan | | | | | | |
| Assign responsibility for tasks | | | | | | |
| Initiate policy change procedures | | | | | | |
| Inform stakeholders of policy change procedures | | | | | | |
| ETC IT App Developer | 2 hrs | | | | | |

Resource Usage as of Mon 8/1/11
WBS - PPS Enrollment & Transfer 2007

| | Jul 17, '11 | Jul 24, '11 | Jul 31, '11 | Aug 7, '11 | Aug 14, '11 | Aug 21, |
|---|---|---|---|---|---|---|
| List current ETC software | 2 hrs | | | | | |
| Institute software changes | | | | | | |
| Train employees on new software | | | | | | |
| ETC Technical Analyst | 10 hrs | | | | | |
| List current ETC software | 2 hrs | | | | | |
| Define cost analysis criteria | 8 hrs | | | | | |
| Initiate policy change procedures | | | | | | |
| Train employees on new software | | | | | | |
| ETC Data Analyst | 2 hrs | | | | | |
| List current ETC software | 2 hrs | | | | | |
| ETC Chief Clerk | 21.8 hrs | 10.2 hrs | | | | |
| List current ETC activities | 2 hrs | | | | | |
| Identify data collection medium | 2 hrs | | | | | |
| Develop surveys | 8 hrs | | | | | |
| Write interview questions / outline | 8 hrs | | | | | |
| Conduct inteviews | 1.5 hrs | 8.5 hrs | | | | |
| Send out surveys | 0.3 hrs | 1.7 hrs | | | | |
| ETC Placement Specialist | 20 hrs | | | | | |
| List current ETC activities | 2 hrs | | | | | |
| Identify data collection medium | 2 hrs | | | | | |
| Develop surveys | 8 hrs | | | | | |
| Write interview questions / outline | 8 hrs | | | | | |
| Chief of Staff | | | | | | |
| Achieve acceptance of plan | | | | | | |
| Assign responsibility for tasks | | | | | | |
| Initiate policy change procedures | | | | | | |
| Inform stakeholders of policy change procedures | | | | | | |
| Total | 128.1 hrs | 50.7 hrs | 40 hrs | 40 hrs | 64 hrs | |

Resource Usage as of Mon 8/1/11
WBS - PPS Enrollment & Transfer 2007

| | Aug 21, '11 | Aug 28, '11 | Sep 4, '11 | Sep 11, '11 | Sep 18, '11 | Sep 25, |
|---|---|---|---|---|---|---|
| Project Manager | 2.4 hrs | | | | 0.3 hrs | |
| Contact / Inteview SME | | | | | | |
| Read RFP | | | | | | |
| Read provided documentation | | | | | | |
| Define cost analysis criteria | | | | | | |
| Identify data collection medium | | | | | | |
| Develop surveys | | | | | | |
| Write interview questions / outline | | | | | | |
| Conduct inteviews | | | | | | |
| Identify areas of improvement | | | | | | |
| Identify needed policy changes | | | | | | |
| Rank implementation results | | | | | | |
| Achieve acceptance of plan | 2.4 hrs | | | | | |
| Inform stakeholders of policy change procedures | | | | | 0.3 hrs | |
| Offer continued services | | | | | | |
| Project Integration Engineer | 2 hrs | | | | | |
| Contact / Inteview SME | | | | | | |
| Read RFP | | | | | | |
| Read provided documentation | | | | | | |
| List current ETC activities | | | | | | |
| List current ETC software | | | | | | |
| Define cost analysis criteria | | | | | | |
| Perform cost analysis | | | | | | |
| Identify areas of improvement | | | | | | |
| Identify needed policy changes | | | | | | |
| Rank implementation results | | | | | | |
| Generate analysis report with change recommendations | 2 hrs | | | | | |
| Project Data Analyst | 2 hrs | | | | | |
| Contact / Inteview SME | | | | | | |
| Read RFP | | | | | | |
| Read provided documentation | | | | | | |
| List current ETC activities | | | | | | |
| List current ETC software | | | | | | |
| Perform cost analysis | | | | | | |
| Summarize interview data | | | | | | |
| Summarize survey data | | | | | | |
| Rank implementation results | | | | | | |
| Generate analysis report with change recommendations | 2 hrs | | | | | |
| ETC Director | 7.9 hrs | 10 hrs | 10 hrs | 10 hrs | 8.8 hrs | |
| Contact / Inteview SME | | | | | | |
| Define cost analysis criteria | | | | | | |
| Achieve acceptance of plan | 2.4 hrs | | | | | |
| Assign responsibility for tasks | 4 hrs | | | | | |
| Initiate policy change procedures | 1.5 hrs | 10 hrs | 10 hrs | 10 hrs | 8.5 hrs | |
| Inform stakeholders of policy change procedures | | | | | 0.3 hrs | |
| ETC IT App Developer | 6 hrs | 40 hrs | 40 hrs | 40 hrs | 40 hrs | |

Resource Usage as of Mon 8/1/11
WBS - PPS Enrollment & Transfer 2007

| | Aug 21, '11 | Aug 28, '11 | Sep 4, '11 | Sep 11, '11 | Sep 18, '11 | Sep 25, |
|---|---|---|---|---|---|---|
| List current ETC software | | | | | | |
| Institute software changes | 6 hrs | 40 hrs | 40 hrs | 40 hrs | 40 hrs | |
| Train employees on new software | | | | | | |
| ETC Technical Analyst | 3 hrs | 20 hrs | 20 hrs | 20 hrs | 17 hrs | |
| List current ETC software | | | | | | |
| Define cost analysis criteria | | | | | | |
| Initiate policy change procedures | 3 hrs | 20 hrs | 20 hrs | 20 hrs | 17 hrs | |
| Train employees on new software | | | | | | |
| ETC Data Analyst | | | | | | |
| List current ETC software | | | | | | |
| ETC Chief Clerk | | | | | | |
| List current ETC activities | | | | | | |
| Identify data collection medium | | | | | | |
| Develop surveys | | | | | | |
| Write interview questions / outline | | | | | | |
| Conduct inteviews | | | | | | |
| Send out surveys | | | | | | |
| ETC Placement Specialist | | | | | | |
| List current ETC activities | | | | | | |
| Identify data collection medium | | | | | | |
| Develop surveys | | | | | | |
| Write interview questions / outline | | | | | | |
| Chief of Staff | 7 hrs | 4 hrs | 4 hrs | 4 hrs | 3.7 hrs | |
| Achieve acceptance of plan | 2.4 hrs | | | | | |
| Assign responsibility for tasks | 4 hrs | | | | | |
| Initiate policy change procedures | 0.6 hrs | 4 hrs | 4 hrs | 4 hrs | 3.4 hrs | |
| Inform stakeholders of policy change procedures | | | | | 0.3 hrs | |
| Total | 30.3 hrs | 74 hrs | 74 hrs | 74 hrs | 69.8 hrs | |

Resource Usage as of Mon 8/1/11
WBS - PPS Enrollment & Transfer 2007

| | Sep 25, '11 | Oct 2, '11 | Oct 9, '11 | Oct 16, '11 | Oct 23, '11 | Oct 30, |
|---|---|---|---|---|---|---|
| Project Manager | 2 hrs | 1.7 hrs | | | | |
| Contact / Inteview SME | | | | | | |
| Read RFP | | | | | | |
| Read provided documentation | | | | | | |
| Define cost analysis criteria | | | | | | |
| Identify data collection medium | | | | | | |
| Develop surveys | | | | | | |
| Write interview questions / outline | | | | | | |
| Conduct inteviews | | | | | | |
| Identify areas of improvement | | | | | | |
| Identify needed policy changes | | | | | | |
| Rank implementation results | | | | | | |
| Achieve acceptance of plan | | | | | | |
| Inform stakeholders of policy change procedures | 2 hrs | 1.7 hrs | | | | |
| Offer continued services | | | | | | |
| Project Integration Engineer | | | | | | |
| Contact / Inteview SME | | | | | | |
| Read RFP | | | | | | |
| Read provided documentation | | | | | | |
| List current ETC activities | | | | | | |
| List current ETC software | | | | | | |
| Define cost analysis criteria | | | | | | |
| Perform cost analysis | | | | | | |
| Identify areas of improvement | | | | | | |
| Identify needed policy changes | | | | | | |
| Rank implementation results | | | | | | |
| Generate analysis report with change recommendations | | | | | | |
| Project Data Analyst | | | | | | |
| Contact / Inteview SME | | | | | | |
| Read RFP | | | | | | |
| Read provided documentation | | | | | | |
| List current ETC activities | | | | | | |
| List current ETC software | | | | | | |
| Perform cost analysis | | | | | | |
| Summarize interview data | | | | | | |
| Summarize survey data | | | | | | |
| Rank implementation results | | | | | | |
| Generate analysis report with change recommendations | | | | | | |
| ETC Director | 2 hrs | 1.7 hrs | | | | |
| Contact / Inteview SME | | | | | | |
| Define cost analysis criteria | | | | | | |
| Achieve acceptance of plan | | | | | | |
| Assign responsibility for tasks | | | | | | |
| Initiate policy change procedures | | | | | | |
| Inform stakeholders of policy change procedures | 2 hrs | 1.7 hrs | | | | |
| ETC IT App Developer | 40 hrs | 40 hrs | 40 hrs | 40 hrs | 40 hrs | |

Resource Usage as of Mon 8/1/11
WBS - PPS Enrollment & Transfer 2007

| | Sep 25, '11 | Oct 2, '11 | Oct 9, '11 | Oct 16, '11 | Oct 23, '11 | Oct 30, |
|---|---|---|---|---|---|---|
| List current ETC software | | | | | | |
| Institute software changes | 40 hrs | 40 hrs | 40 hrs | 34 hrs | | |
| Train employees on new software | | | | 6 hrs | 40 hrs | |
| ETC Technical Analyst | | | | 6 hrs | 40 hrs | |
| List current ETC software | | | | | | |
| Define cost analysis criteria | | | | | | |
| Initiate policy change procedures | | | | | | |
| Train employees on new software | | | | 6 hrs | 40 hrs | |
| ETC Data Analyst | | | | | | |
| List current ETC software | | | | | | |
| ETC Chief Clerk | | | | | | |
| List current ETC activities | | | | | | |
| Identify data collection medium | | | | | | |
| Develop surveys | | | | | | |
| Write interview questions / outline | | | | | | |
| Conduct inteviews | | | | | | |
| Send out surveys | | | | | | |
| ETC Placement Specialist | | | | | | |
| List current ETC activities | | | | | | |
| Identify data collection medium | | | | | | |
| Develop surveys | | | | | | |
| Write interview questions / outline | | | | | | |
| Chief of Staff | 2 hrs | 1.7 hrs | | | | |
| Achieve acceptance of plan | | | | | | |
| Assign responsibility for tasks | | | | | | |
| Initiate policy change procedures | | | | | | |
| Inform stakeholders of policy change procedures | 2 hrs | 1.7 hrs | | | | |
| Total | 46 hrs | 45.1 hrs | 40 hrs | 46 hrs | 80 hrs | |

Resource Usage as of Mon 8/1/11
WBS - PPS Enrollment & Transfer 2007

| | Oct 30, '11 | Nov 6, '11 | Nov 13, '11 | Total |
|---|---|---|---|---|
| Project Manager | 1.5 hrs | 6.5 hrs | | 79.2 hrs |
| Contact / Inteview SME | | | | 4 hrs |
| Read RFP | | | | 2 hrs |
| Read provided documentation | | | | 4 hrs |
| Define cost analysis criteria | | | | 0.8 hrs |
| Identify data collection medium | | | | 0.4 hrs |
| Develop surveys | | | | 0.8 hrs |
| Write interview questions / outline | | | | 0.8 hrs |
| Conduct inteviews | | | | 10 hrs |
| Identify areas of improvement | | | | 20 hrs |
| Identify needed policy changes | | | | 20 hrs |
| Rank implementation results | | | | 2 hrs |
| Achieve acceptance of plan | | | | 2.4 hrs |
| Inform stakeholders of policy change procedures | | | | 4 hrs |
| Offer continued services | 1.5 hrs | 6.5 hrs | | 8 hrs |
| Project Integration Engineer | | | | 108 hrs |
| Contact / Inteview SME | | | | 4 hrs |
| Read RFP | | | | 2 hrs |
| Read provided documentation | | | | 4 hrs |
| List current ETC activities | | | | 1 hr |
| List current ETC software | | | | 1 hr |
| Define cost analysis criteria | | | | 8 hrs |
| Perform cost analysis | | | | 20 hrs |
| Identify areas of improvement | | | | 20 hrs |
| Identify needed policy changes | | | | 20 hrs |
| Rank implementation results | | | | 4 hrs |
| Generate analysis report with change recommendations | | | | 24 hrs |
| Project Data Analyst | | | | 76 hrs |
| Contact / Inteview SME | | | | 4 hrs |
| Read RFP | | | | 2 hrs |
| Read provided documentation | | | | 4 hrs |
| List current ETC activities | | | | 1 hr |
| List current ETC software | | | | 1 hr |
| Perform cost analysis | | | | 20 hrs |
| Summarize interview data | | | | 8 hrs |
| Summarize survey data | | | | 8 hrs |
| Rank implementation results | | | | 4 hrs |
| Generate analysis report with change recommendations | | | | 24 hrs |
| ETC Director | | | | 62.4 hrs |
| Contact / Inteview SME | | | | 4 hrs |
| Define cost analysis criteria | | | | 8 hrs |
| Achieve acceptance of plan | | | | 2.4 hrs |
| Assign responsibility for tasks | | | | 4 hrs |
| Initiate policy change procedures | | | | 40 hrs |
| Inform stakeholders of policy change procedures | | | | 4 hrs |
| ETC IT App Developer | 34 hrs | | | 402 hrs |

Resource Usage as of Mon 8/1/11
WBS - PPS Enrollment & Transfer 2007

| | Oct 30, '11 | Nov 6, '11 | Nov 13, '11 | Total |
|---|---|---|---|---|
| List current ETC software | | | | 2 hrs |
| Institute software changes | | | | 320 hrs |
| Train employees on new software | 34 hrs | | | 80 hrs |
| ETC Technical Analyst | 34 hrs | | | 170 hrs |
| List current ETC software | | | | 2 hrs |
| Define cost analysis criteria | | | | 8 hrs |
| Initiate policy change procedures | | | | 80 hrs |
| Train employees on new software | 34 hrs | | | 80 hrs |
| ETC Data Analyst | | | | 2 hrs |
| List current ETC software | | | | 2 hrs |
| ETC Chief Clerk | | | | 32 hrs |
| List current ETC activities | | | | 2 hrs |
| Identify data collection medium | | | | 2 hrs |
| Develop surveys | | | | 8 hrs |
| Write interview questions / outline | | | | 8 hrs |
| Conduct inteviews | | | | 10 hrs |
| Send out surveys | | | | 2 hrs |
| ETC Placement Specialist | | | | 20 hrs |
| List current ETC activities | | | | 2 hrs |
| Identify data collection medium | | | | 2 hrs |
| Develop surveys | | | | 8 hrs |
| Write interview questions / outline | | | | 8 hrs |
| Chief of Staff | | | | 26.4 hrs |
| Achieve acceptance of plan | | | | 2.4 hrs |
| Assign responsibility for tasks | | | | 4 hrs |
| Initiate policy change procedures | | | | 16 hrs |
| Inform stakeholders of policy change procedures | | | | 4 hrs |
| Total | 69.5 hrs | 6.5 hrs | | 978 hrs |

## Issue Log

| Issue # | Issue Description | Impact on Project | Date Reported | Reported By | Assigned To | Priority (M/H/L) | Due Date | Status | Comments |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Establish population pool to interview & create an interview committee | Key component of main deliverable | 7/1/2011 | Aron Yucha | Aron Yucha | High | 7/15/2011 | Closed | Population Pool has been established. Interview Committee has been created. |
| 2 | Marty and Jared on vacation 8/13/2011 – 8/27/2011 | Members of Interview Committee: impacts interviewing process, scheduled stakeholder meetings, daily work output/production | 8/1/2011 | Marty & Jared | Rafael Colon | High | 8/5/ 2011 | In Progress | Need to establish work-arounds for high priority tasks |
| 3 | Team Member Birth Window: (8/5/2011 – 8/15/2011) | Part of Interview Committee, Working on Business Flow analysis | 7/1/2011 | Niharika Jeena | Rafael Colon | High | Pending | In Progress | What-If Analysis, Scenario Planning has commenced. Work-Around Plan A, B, C established. |
| 4 | Create ABC (Work-Process, Organization, Activity) Flow Charts | Schedule | 8/1/2011 | Marty Flansburg | Marty Flansburg | Med. | 8/13/2011 | In Progress | Marty is working on creating charts to aid in business analysis |
| **Issue #** | **Issue Description** | **Impact on Project** | **Date Reported** | **Reported By** | **Assigned To** | **Priority (M/H/L)** | **Due Date** | **Status** | **Comments** |
| 5 | Current ABC Policies subject to change | Schedule, Budget | 8/1/2011 | Judy Brennan | Group 1 | Med. | 8/11/2011 | Pending | Policy Reform Committee will announce changes on 8/11/2011 |
| 6 | Outsourced Consulting Firm hired for Survey Activities cannot contact SME | Morale, Schedule | 8/3/2011 | Consulting Firm Rep. | Jared Omulindi | Med. | 8/11/2011 | In Progress | Jared is working on establishing a communication plan for these stakeholders |

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 7 | Selected Technology Consultant (Web Design & Software) could potentially miss Install deadline | Potential Impacts: Budget, Schedule, Team/Community Morale, Complicate ABC Transfer Process for coming year | 8/5/2011 | Rafael Colon | Aron Yucha | High | 8/13/2011 | In Progress | Stakeholder meetings have been conducted. Schedule adjustments have been evaluated and approved, cost-benefit analysis has been conducted, new RFB has been posted, **Activities remaining: Vendor analysis, recommendation, and selection.** |

## Responsibility Assignment Matrix

**WBS Activities**
**OBS Units**
↓

| → | 1.3.1 | 1.3.2 | 1.3.3 | 1.3.4 | 1.3.5 | 1.3.6 | 1.3.7 |
|---|---|---|---|---|---|---|---|
| Project Manager | | R, P | | | | P | P |
| Project Integration Engineer | P | | | | | R, P | R, P |
| Project Data Analyst | R, P | | R, P | | R, P | | |
| ETC Director | | | | | | | P |
| ECT Chief clerk | | P | | R, P | | | |

**Key:**

R = Responsible organizational unit
P = Performing organizational unit

# Meeting Agenda / Interim Presentation

**Date:** Thursday, July 28, 2011

**Time:** 10:20 pm

**Location:** FAB room 50-05

**Chair: Rafael Colon**

**Attendees:** Jared Omulindi, Niharika Jenna, Aron Yucha, Marty Flansburg

**Objective:** To confirm tasks for Set II Deliverables.

**Agenda:**

Introduction/Background: All members (3 minutes)

- Brief description of current status

Questions: All (5-10 minutes)

1. Which tasks need to be completed first?
2. Which tasks can be completed later in the week?
3. Who can start working on the important tasks first?
4. When will each member be working on and completing their assignments?

**Next Steps (Outcomes of this meeting):** (Bulleted list of who will be doing what)

- **Aron**
  - Financial Analysis
  - Issues Log?
- **Marty**
  - Correspondence with SME
  - Meeting minutes
  - SME evaluation at Pulse check
- **Rafael**
  - RAM
  - WBS
- **Niharika**
  - Resource Usage Report
  - Team Contract
- **Jared**
  - Risk Register
  - Stakeholder Register
  - Stakeholder Strategy

**Next Meeting:** Week of 8/1-5/2011.

## Risk Register

| No | Risk(positive/Negative) | Category(H/L/M) | Contingency Plan |
|---|---|---|---|
| 1 | Federal title 1 fund | H | Possible cuts to transfer program. |
| 2 | State schools funds for 100 students will be lost if inter-district transfer requirements are not met | H | Possible cuts to transfer program. |

| | | | |
|---|---|---|---|
| 3 | 25 programs and associated school enrollment is threatened | H | Eliminate programs. |
| 4 | Lack of executive support | L | Need to find champion. |
| 5 | Lack of user support due to fear of job loss | L | Awareness education. |
| 6 | Commitment of project team to the project | L | Replace personnel. |
| 7 | Current hardware/network may not support the new system. | M | Upgrade HW or design new solution. |
| 8 | Supplier may supply the equipment late or an equipment that is not compatible with the available network | M | Put clause in purchasing agreement. |
| 9 | With rapid changing tech knowledge, it might be hard to satisfy the customer | L | Teach customers. |
| 10 | The systems super user might find another job opportunity before the end of the project | L | Hire replacement. |
| 11 | Competitor might lower the cost of the service and course the customer give the contract | L | Lower price or offer better service. |

# Lessons Learned

**Prepared by: Team 1** **Date: 8/8/2011**

**Project Name: ABC Enrollment and Transfers**

**Project Sponsor:** ABC

**Project Manager:** ABC

**Project Dates:**

**Final Budget:**

1. Did the project meet scope, time, and cost goals?
   We met scope, time, and cost criteria.

2. What was the success criteria listed in the project scope statement?

   - The project aims to automate various processes, such as; filling an application, updating the database and data retrieval.
   - Time, cost and quality metrics and effort estimation models will be implemented.
   - Develop list of priority services aligned with district goals.
   - Streamline operations within 3 months such that current levels of service can be maintained despite reduction in available resources.
   - Shorten processing time after automation of enrollment and transfer services.

3. Reflect on whether or not you met the project success criteria.
   As mentioned above we interviewed and send out surveys to find gaps in the current system and had come out with project management plan , communication plan, cost benefit analysis, what if analysis, workaround plans (Plan A, Plan B, Plan C).In order to prioritize services stakeholder meetings had been conducted. We prioritized all the services available in ABC. After prioritizing services suggestions for improvements has

been sent so that automation of current system can be performed smoothly.

4. In terms of managing the project, what were the main lessons your team learned?
    - Good Teamwork: Prioritizing and distributing work on time and submitting work assigned before the schedule so that your team can review it before sending it to other stakeholders in the project.

    - Good Planning: Spending more time in planning phase had paid its cost. It was easier to follow all the processes in the project when we had a good set of documents such as WBS, project charter, business case, communication plan, team contract, pre financial analysis, prioritized risk list.

    - MS project software was helpful to create WBS, allocating resources, Resource Usage Report, following milestones for the projects.

5. Describe one example of what went right on this project.
   Communication within team was good. Team had defined its approach for documentation and distributed workload evenly. Team members were flexible to make changes and updating documents.
   Identifying Risks: It helped a lot in managing cost and schedule and creating mitigation plan to avoid risks on time. We were able to integrate contingency plans to our project schedule. It was easier to relate cost control and budget issues to identified risks.

6. Describe one example of what went wrong on this project.
   Third party vendor were not allowed to communicate with SME to conduct survey which affected the schedule initially created.
   Not knowing the organization's process effectively to implement the project.
   Here was no escalation procedures for corrective actions

7. What will you do differently on the next project based on your experience working on

this project?
We will have a better communication plan for third party vendors.
Coordinate process improvement activities more effectively
Issues which are not closed yet will be tracked down and corrective action will be taken in order to improve the process
Look for historical data to know the trend and to know the business objectives.

## Future Opportunities

**Current System:**

- Partially Automated
- Different Languages
- Too much manual verification

The current system is partially automated where transfers are done online but verification of transfers is done manually. Manual verification is required for inter district transfers since public schools in other districts are not connected to ABC. Verifications for the lottery system are also only partially automated.

New petition forms are processed manually in the current system since most parents are not tech savvy and quite a few have Spanish and Russian as their primary language.

Even if we consider a scenario where 20 percent people do not understand English and another 25 percent are not tech savvy; that still leaves 55 percent who speak English and could use the online petition process. It saves almost 55% of manual work.

**New System:**

- Automate the verification process

- Automate filing new petition process
- Create a workflow to Approve/Reject application
- Role Based Access to reports
- Prevention from Cyber attacks

Eliminate manual verification: New system will automate the verification process, based on the conditions specified by the ETC management.

Workflow Process: A workflow process will be set up to approve the application for transfers and new petitions. Final decision will depend on the ETC director or the person who normally approves the application. An automated mail will be sent to the responsible person, as well as a reminder mail, if he or she takes too much time to approve or reject the application. Approved/Rejected applicants will get an email if they have provided email id in petition/transfer form, instead of paper, to save cost.

New Petition: New petition form can be streamlined by automating the process with the processes which are already available online or computerized.

All the reports will be accessed over Intranet where each report will only be seen by an authorized person. Roles will be set up on a need to know basis.

All internal applications will be managed over LAN. External petitions directly filed by parents will be processed over WAN using firewall for security to prevent cyber-attacks.

**Application Forms:**

All application forms will be filled online with an option of doing it offline using word doc, pdf etc. Examples of forms that can be used online to integrate the transfer's process are as follows:

- School Choice Checklist
- Supervision Agreement
- Petition Transfer Request Form
- School Choice Application
- Request for Enrolling Resident Students

**Tools and Automation**

- Server running  Redhat Linux
- A minimum of 10 PCs running Windows OS, 1 on Linux OS and 1 Mac desktop running OS X
- Processors: Intel Core 2 Duo / i3 / i5 / i7 class or AMD Phenom Class processors
- Database: Oracle 11g
- Minimum 4GB RAM for workstations, Minimum 8GB RAM for Servers
- 250 GB Hard Drive
- Automation Tools will be used for Stress, Volume and Load Testing.
- We will also use automated tools for defect tracking and test log creation
- For Quality assurance we are plan to use Automated Build Studio by SmartBear Software

**Future Opportunities:**

- Archiving old documents electronically
- Centralized system for all districts in Oregon
- Approval/Rejection letter review

As discussed in the interview process old documents are rarely needed. Another process can be set up where all the old documents which are in paper can be archived electronically to prevent any damage in future such as from fire, water. However, archiving will not be a project priority at this time.

If at some point the decision is taken to integrate the ETC process with the centralized system for all public schools in Oregon, we would appreciate it if our team is considered for that project.

During interview process we found out that parents find it difficult to understand whether their child's application has got accepted or rejected. Most of them come back to ABC looking for answers. This takes up time and resources. The letter should be revised in order to eliminate this overhead.

## Thank You Letter

August 8, 2011

XXXXXXX
Director
ABC Enrollment & Transfer Center
501 North Dixon Street
Portland, OR 97227

Dear XXXX:

Please accept our gratitude for the supportive role you played in our ETM 510 – Project Planning and Implementation course project, at Portland State University, this summer. The time you spent working with us was an extremely valuable tool in our learning of project management theory and application.

You allowed us to gain knowledge of the problems you, and ABC, face with the upcoming budget cuts. This scenario helped to illustrate to us how a quality project management plan would need to be in place prior to any lost funding.

Your willingness to participate in a "real-world" problem for our course added a dimension that could not have been covered otherwise. We hope that the experience was mutually beneficial as well.

Thank you for giving your time and effort to aid in our learning.

Sincerely,

Rafael Colon
Marty Flansburg
Niharika Jenna
Jared Omulindi
Aron Yucha