

**DEPARTMENT OF GENERAL SERVICES
BUSINESS PROCESS IMPROVEMENT OFFICE
PROJECT CHARTER**

MOBILE MAINTENANCE PILOT
PROJECT CHARTER

<04/12/2017>

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Introduction

1.1 PURPOSE OF PROJECT CHARTER

The Mobile Maintenance Pilot project charter documents and tracks the necessary information required by decision maker(s) to approve the project for commitment of resources, funding and organizational priority. The project charter should include the needs, scope, justification, and resource commitment as well as the project's sponsor(s) decision to proceed or not to proceed with the project. It is created during the Initiating Phase of the project.

The intended audience of the Mobile Maintenance Pilot project charter is the project sponsor and senior leadership.

2 PROJECT OVERVIEW

The project engages three agency units—Facility Maintenance, Fiscal, Business Process Improvement—it has 2 primary stakeholders, an estimated project duration of 21 months and estimated cost of \$37,500. This cost represents the amount of new spending for the duration of the project that results from the decision to implement the project. It does not include the salaries associated with existing technicians who were assigned to the mobile pilot program.

3 JUSTIFICATION

3.1 BUSINESS NEED

Two overarching reasons exist—*budgetary*: improving the rate model to facilitate the move of additional buildings into the Internal Service Fund and projecting agency spending and the full cost to DGS for providing this service, *performance*: customer satisfaction and work order close times are two key performance indicators used by the agency for regular management purposes. Additionally, these measures are reported on publicly and used by the Outcome Based Budget teams to make decisions about funding allocations to the agency.

Reductions in work order durations, eliminating unnecessary travel associated with the work order process, improvements in customer satisfaction and increased preventative maintenance checks, proactive assessments and the ability to initiate, assign or address work orders in the field in real time are necessary to sustain recent progress in Facility Maintenance service delivery. Prior to pilot implementation, work order durations in target pilot facilities were 120% greater than average work order durations in the downtown campus for the same type of work.

There is an operational need to reduce the number of work orders that are created without a clear and first hand observation based description of the repair or corrective maintenance need; this will address technician redundancy in travel and investigatory activity.

4 SCOPE

4.1 OBJECTIVES

The objectives of the Mobile Maintenance Pilot are as follows:

- Develop a mechanism for capturing cost of service information for provision of the facility maintenance service necessary to update the rate model for internal service buildings.
- Improve customer service perceptions in 20 facilities (largely police district stations and multipurpose centers) as measured via customer satisfaction feedback data. These facilities are different from the downtown campus facilities in the comparison group in that they do not have assigned maintenance staff.
- Reduce the performance gap in work order durations between downtown campus and satellite facilities. In the current state, to perform the same facility maintenance work takes roughly 17 days longer if the work is outside of the downtown campus. One project goal is to reduce this lag by 3 days.
- Reduce travel times for facility maintenance technicians so that more labor hours per day can be spent on addressing facility maintenance requests. One related objective is to significantly reduce work order travel time associated with work order investigation, creation and parts travel.

4.2 HIGH-LEVEL REQUIREMENTS

The following table presents the requirements that the project's output, service or result should meet in order for the project objectives to be satisfied.

	Requirement Description
1	Vehicle for pilot technicians for mobility.
2	Capture start and stop time for all work orders
3	User manual and training shall be provided to technicians
4	Technician work will be route-based and route-limited exclusively
5	Parts, material must be identified and pre-loaded to vehicle and associated post-work order creation to a work order id
6	Pilot facilities, once set, must remain static throughout the pilot to the 23 facilities listed below in 4.3.

4.3 MAJOR DELIVERABLES

The following table presents the major deliverables that the project's product, service or result must meet in order for the project objectives to be satisfied.

Major Deliverable	Deliverable Description
Van	Vehicle is required to support mobile technician routes
Archibus Mobile Application	App required to support mobile crews and open, transfer or close work orders in real time and, to track labor hours.
Program Design	Identifying facilities and "problem-types" to target to yield the greatest program impact.
Truck Inventory	Outfitting the truck with standard inventory to maximize time in the field.
Pilot Facilities List	Mounted police unit, warrant task force, K9 unit, police district buildings=(E,NE,W,NW,N,SE,W,SW,S), dot building, druid health, eastern health, hatton, joint use marine, lower park heights multipurpose, northern community, oliver, patterson park casino, south east community, waxter

4.4 BOUNDARIES

This section documents the inclusive and exclusive boundaries of the Mobile Maintenance Pilot. It specifically addresses items outside of the scope of the project.

Activities and items excluded or outside the Business Process Improvement Office scope of this project are:

1. Day to day management and supervision of pilot technicians.
2. Coordination of regular status meetings
3. Program expansion
4. Development of Enhancement Proposals or budget related program narratives.

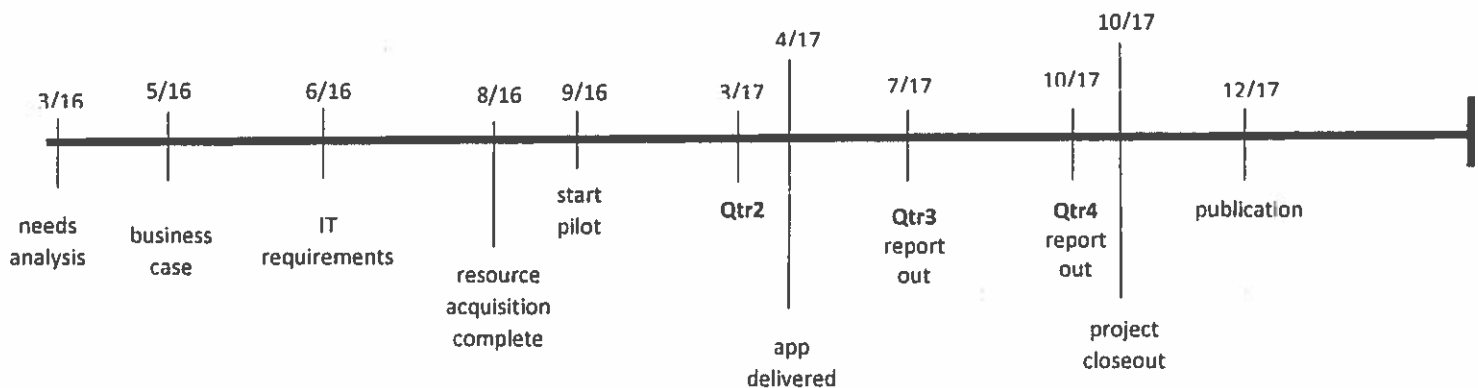
Activities and items included in the Business Process Improvement Office scope and responsibilities of the project are:

1. Needs analysis, business case and resource identification
2. Development of mobile application software requirements
3. Mobile application software testing, quality control and managing vendor communications
4. Development of training material for pilot technicians
5. Procurement of mobile devices and covers
6. Pilot program problem type, facility grouping and route recommendations
7. Provision of quarterly status reports for quarters 1, 2 and 3 that provide high level indicators of stagnation or progress against established project indicators.
8. Quarterly, provision of a prioritized list of recommendations and or concerns related to findings from the performance data and technician feedback from ride-alongs.
9. Facilitate project close out at end of quarter 4 in October of 2017.

5 DURATION

5.1 TIMELINE

Below is a high-level timeline.



5.2 EXECUTIVE MILESTONES

The table below lists the high-level Executive Milestones of the project and their estimated completion timeframe.

Executive Milestones	Estimated Completion Timeframe
Project planned and authorized to proceed	2 months after presentation of business case
Stakeholder charter signatories	2 months after presentation of business case
Procurement and delivery of mobile application	5 months after approval to proceed
FM Division acceptance of 3 rd quarter report on impact and proof of concept	10 months after pilot field start date
FM Division makes internal, independent decision regarding expansion	1 month after Q3 report out
Project impact study and final report	20 months after presentation of business case

6 BUDGET ESTIMATE

6.1 FUNDING SOURCE

Existing Facility Maintenance Division operating funds. No additional fund source required outside of FY17 allocation.

6.2 ESTIMATE

This section provides a summary of estimated spending to meet the objectives of the Mobile Maintenance Pilot project as described in this project charter. This summary of spending is preliminary reflects costs for the entire project lifecycle. It presents probable funding requirements to assist in obtaining budgeting support.

New Budget Item	Qtr1	Qtr2	Qtr3	Qtr4	Total
Onetime License	\$12,616.47	\$ -	\$ -	\$ -	\$12,616.47
Archibus Mobile App Development*	\$18,306.00	\$ -	\$ -	\$ -	\$18,306.00
Mobile Pilot Vehicle**	\$ -	\$ -	\$ -	\$ -	\$ -
Maintenance & Repair	\$665.34	\$665.34	\$665.34	\$665.34	\$2,661.36
Fuel Costs	\$588.40	\$588.40	\$588.40	\$588.40	\$2,353.60
Tablets & Covers	\$1,100.00	\$ -	\$ -	\$ -	\$1,100.00
Data Plan	\$120.00	\$120.00	\$120.00	\$120.00	\$480.00

*There are no ongoing or recurring license costs associated with the mobile application. **Pilot program van was sourced from Fleet Division surplus vehicles to reduce costs and avoid additional procurement.

7 ASSUMPTIONS, CONSTRAINTS AND RISKS

7.1 ASSUMPTIONS

This section identifies the statements believed to be true and from which a conclusion was drawn to define this project charter.

1. Establishing a software dependent mobile maintenance team will eliminate the use and transmission of paper work orders, reducing paper and storage costs and supporting the goal to take the agency paperless.
2. Outcome budget teams will make budget recommendations based, partly, on performance against Key Performance Indicators for customer satisfaction and work order close times. Strong, innovative performance and the ability to demonstrate and communicate this clearly in narrative form will help protect DGS dollars.
3. In order to justify and facilitate the move of additional facilities to the Internal Service Fund an improved rate model is needed that is informed by accurate data on the total costs of providing the Facility Maintenance service, especially, the labor hours associated with resolving work orders.

7.2 CONSTRAINTS

This section identifies any limitation that must be taken into consideration prior to the initiation of the project.

1. Important deliverables that are technical in nature have dependencies on the Archibus team which is under resourced.
2. Levels of understanding of program goals and enthusiasm differ (within the division) across work levels from front line staff to supervisory and management actors.

7.3 RISKS

This section outlines the risks that the project sponsor should be aware of before making a decision on supporting and funding the project. Risks associated with a decision not to support the project include: 1) continued dependence on paper work order review and approval processes and any delays and tracking complications associated with a paper-based process, 2) a rate that doesn't accurately capture labor costs can delay the additional transfer of buildings to the Internal Service Fund and result in charges to agencies that do not capture the full cost of service provision, and 3) maintenance of the status quo will mean the agency misses an opportunity to test the proof of concept on a data-driven-route-based pilot program to improve performance management. If the program is successful, it could provide a compelling case for protecting General Fund resources and development of an effective enhancement proposal on a proven concept.

Risk	Mitigation
Limited engagement	1. Develop BPIO rapport with technicians through field "ride-alongs" and assistance with small-scale work problems they share in discovery.

Risk	Mitigation
	2. Schedule frequent check-ins intended to display the goal of the mobile program from the viewpoint of how it eases their day to day work and reduces both travel time and paperwork.
Technician resistance to the technology	Direct engagement with pilot & non-pilot technicians by FMD Deputy Chief and Division Chief.
Inability to translate process and performance changes directly into customer service data.	Initiating secondary project to address the customer service data collection problem identified in FY17 outcome budget submission. (Project 17-066 Customer Satisfaction)

8 PROJECT ORGANIZATION

8.1 ROLES AND RESPONSIBILITIES

This section describes the key roles supporting the project.

Name & Organization	Project Role	Project Responsibilities
Berke Attila Fiscal & Strategic Mgmt.	Primary Stakeholder	Responsible for review and approval of strategies to resolve project risks and is a vocal and visible project champion. May approve any scope changes proposed by project manager, lead or project sponsor.
Delmar Austin FMD	Stakeholder	Provides frequent and direct feedback, observations about the implementation of the project to ensure success and help with early identification of challenges and successes. Responsible for understanding project goals.
Kagesta Campbell Archibus Office	Database Administrator	Responsible for understanding business requirements and communicating system capabilities and potential solutions that ensure clean project data. Supports customized reports.
Terrel Chesson FMD	Business Steward Project Officer	Has major shared responsibilities for project delivery. Takes a leadership role in defining, analyzing and documenting requirements of the project from the FMD perspective. Plays a lead role in planning, monitoring progress and is vocal and visible in regularly communicating the project goal to FMD employees. Responsible for managing the key human resources in the project. Responsible for regular monitoring to advise on potential adjustments to ensure project goals and Outcome Budget KPIs are met—develops reports for individual use for this purpose.
Cole Devries BPIO	Project Manager	Responsible for project activity coordination and management, ensures timely communication on deliverables, project health and escalation of issues

Name & Organization	Project Role	Project Responsibilities
		that cannot be resolved within project. Manages change requests and ensures overall project delivery within budget, scope and schedule. Manages quarterly reporting structure and M&E. Develops project plan and timeline and is responsible for the day to day management of the project. Manages change requests and project procurements.
Babila Lima BPIO	Project Lead Functional	Responsible for reviewing, approving and validating deliverables and ensures necessary stakeholders and resources are engaged and available to the project team. Communicates project information to stakeholders, sponsors and external constituents and makes project decisions on behalf of the client. Develops, approves, recommends project plan and activities. Assigns tasks and identifies necessary changes to policies or procedures to accommodate new processes and assess impacts. Must approve any scope changes proposed by project manager, stakeholders or project sponsor.
Varghese Paraniham BPIO	Tester	Responsible for technical assistance and stewardship on application testing, vendor communications.
	Project Manager (secondary 17-066)	Responsible for managing and implementing secondary project to fix challenges with customer service data collection.
Sergio Roach FMD	Stakeholder	Provides frequent and direct feedback, observations about the implementation of the project to ensure success and help with early identification of challenges and successes. Responsible for understanding project goals.
Steve Sharkey Agency Head	Sponsor	Responsible for providing guidance on high level goals and priorities. Provides financial resources. Is accountable for enabling project success.
Steve Stricklin FMD	Primary Stakeholder	Responsible for review and approval of strategies to resolve project risks and is a vocal and visible project champion. Must approve any scope changes proposed by project manager, lead or project sponsor.

8.2 STAKEHOLDERS (INTERNAL AND EXTERNAL)

This project consists primarily of internal stakeholders across three different units within the Department of General Services. External stakeholders such as software vendor and contractors will be managed by project team members to meet project goals.

9 PROJECT CHARTER APPROVAL

The undersigned acknowledge they have reviewed the project charter and authorize and fund the Mobile Maintenance Pilot project. Changes to this project charter will be coordinated with and approved by the undersigned or their designated representatives.

Steve Sharkey

Signature:



Date:

4/25/17

Print Name:

SHARKEY

Title:

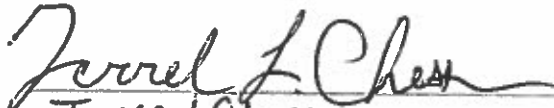
Agency Director

Role:

Sponsor

Steve Stricklin (or designee)

Signature:



Date:

6/1/17

Print Name:

Terrell Chesion

Title:

Division Chief

Role:

Stakeholder

Babila Lima

Signature:



Date:

4/24/17

Print Name:

Babila Lima

Title:

Director, BPIO

Role:

Project Lead Functional