

Engagement Plan

CLIENT/FACILITY & CI CoE Pilot

Draft Version 1.0

02/06/2019

“For CI CoE Pilot Distribution to *CLIENT/FACILITY* Personnel Only” –

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1 Engagement Purpose, Goals, and Objectives

The *CLIENT/FACILITY* is a ~Who is /~. *CLIENT/FACILITY* what does the client do~.

The CI CoE Pilot (henceforth “Pilot”) has engaged with *CLIENT/FACILITY* to aid them in improving specific areas of their cyberinfrastructure (CI) and CI management processes. This Engagement Plan covers the thrust of that engagement aimed specifically at *CLIENT/FACILITY* 's identity management needs.

The primary goals and related objectives for this engagement are:

A. ~List goals ~

With these goals in mind, CI CoE Pilot is committed to working with the *CLIENT/FACILITY* staff on this effort on a weekly basis through *Date*. We will identify specific objectives and tasks at weekly meetings.

2 Timeline

- **Feb 6th 2019:** Detailed engagement objective and task setting; initiation of regular *CLIENT/FACILITY* -CI CoE Pilot meetings
- **May 31st 2019:** CI CoE Pilot Completes Implementation of agreed ID management solution.
- **June 3rd 2019:** CI CoE Pilot starts writing experience paper.
- **June 28th 2019:** CI CoE Pilot completes writing experience paper.

3 Resources

3.1 CI CoE Pilot

Engagement lead is ~nameA~ and engagement second ~nameB~. Identify other CI CoE Pilot engagement team members. Briefly describe expertise or roles. Describe allocated effort.

3.2 *CLIENT/FACILITY*

Principal Research Scientist Christine Lackey is the primary contact, and lead on the data portal team at *CLIENT/FACILITY* . ~name~ **** is the Secondary project Contact. ~name2~ **** is the Project implementation contact.

. Describe effort engagee will allocate to the engagement during the execution period

4 Engagement Risks and Mitigations

- *Changing timelines and priorities:*
- *The need to address interoperability with current software and hardware requirements:*
- *Information Security:* This engagement may entail the communication of facts and opinions related to security for which precautions should be taken to avoid, e.g., inadvertent disclosure.
 - *Awareness and open exchange.* CI CoE Pilot and *CLIENT/FACILITY* will have open, frank discussions around any concerns regarding information security as it pertains to this engagement, including the classification and marking of information considered appropriate only for limited distribution.
 - *Secure communications.* CI CoE Pilot makes an effort to select usable communication channels appropriate to the sensitivity of the content of those communications.
 - *Secure information storage.* CI CoE Pilot uses Google Drive to store documents related to engagements as well as other CI CoE Pilot functions. CI CoE Pilot requires that staff accounts used to access CI CoE Pilot engagement documents use a strong, unique password and use Google 2-step verification. By default, all active CI CoE Pilot personnel who have complied with these requirements have access to engagement documents. Members of engaged projects with whom CI CoE Pilot shares materials via Google Drive are also strongly encouraged to use these practices.

5 Metrics

We plan to monitor our progress during the engagement using these metrics:

- We will use the milestones outlined in the project timeline to determine project

progress.

- At the completion of the engagement execution phase, lessons learned activity will be conducted to identify areas of strength and areas of weakness in our engagement process, as well as recoverables from this engagement. The results of this activity will be used to refine future engagements as well as CI CoE Pilot processes and templates.
- Six (6) months and one (1) year after the engagement ends CI CoE Pilot will ask *CLIENT/FACILITY* to evaluate the impact of the engagement.
- Prior to the drafting of its yearly report to NSF, CI CoE Pilot give *CLIENT/FACILITY* the opportunity to contribute feedback on the engagement and its impact to that report.

6 Intellectual Merit, Broader Impacts, & Recoverables

Recoverables for future engagements are expected to include:

- Additional expertise and insights into the cybersecurity needs of the environmental research community.
- Refinements to the CI CoE Pilot *Guide*, tools, and templates based upon experience from the engagement.

7 Version Log

Ver001- 20190206

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This material is based in part on work supported by the National Science Foundation under Grant Number XXX-0000000 and XXX-0000000. Any opinions, findings, and conclusions or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the National Science Foundation.