**OSG year6 Project Management Work Plan**

# Strategy

OSG is a project with over 30 FTE across 10 institutions; in addition, it has many external relationships with collaborators and suppliers. Research communities, science experiments, and universities that use or are interested in using DHTC concepts, services, and tools are the primary customers of OSG. A key to success for a project of this size and complexity is to ensure that we have documented work-plans that are well communicated to the directly affected parties and supporting teams and that we understand and manage our interfaces; it is critical that these work-plans cover all the goals and milestones in the project proposal and the related needs of stakeholders. Since the project is geographically distributed with staff at many institutions that are funded as sub-contracts by the OSG, we must have good methods for planning and tracking of these enabling resources.

The project management team’s primary objective is to provide a project management system for the OSG team to assure that the project does what is says it will do in each functional area’s work plans (as updated based on documented changes); and that we communicate our work accomplishments, status, issues/concerns, and future plans to the funding agencies, members of the consortium, and within our project team.

The scope of coverage is the small number of projects (estimated at 2-4) that comprise the OSG core; there is no direct project management support for satellite projects but we do plan to offer some consulting, if requested, and we will track the deliverables to/from satellite projects.

# Requirements

This functional area is internal to the OSG project and gets it requirements from the interface/reporting requirements of DOE/NSF, OSG management, and OSG staff; there are no direct interfaces to the science communities. In addition to the OSG’ proposal, the requirements that guide this work are discussed in the OSG Project Management Process document (<https://osg-docdb.opensciencegrid.org:440/cgi-bin/ShowDocument?docid=850>).

# Tactics and Changes in our Methods

There are some important changes from prior practice that we propose to implement in year6 in how we perform this function:

1. Each area coordinator will be responsible for planning, documenting, and tracking their work program; the project manager assists each area coordinator. Jointly, they will track progress, document any needed changes, and issue alerts to OSG management. We expect that the area work plans are living documents and can be changed, if needed; however, we expect all such changes to be documented and made visible to the OSG-ET and affected stakeholders. The area coordinators will be responsible for keeping current the “captured on-line representation” of their work plan using the common OSG project management methods and tools.
2. A significant part of what we do is on-going activities and starting in year6 we will separate these items from the date driven project tasks. Thus we can add needed focus to these and improve the way we judge whether do better at understanding why we think they are being executed well (in general, it is not very useful to say 8% done for each month that elapses). On this regard, we will ask area coordinators to establish “goodness” measures for each of these. This will be a learning path and it will evolve over time; however, area coordinator should start by stating a draft measure for each on-going activity (in collaboration with the assessment work being done by Rob Gardner).
3. As we move farther into the “coordinated multiple projects” mode with satellites and docked projects, we need to improve cross-project communication, coordination, and implement methods for bringing focus to cross-project issues. More regular, no less than quarterly, phone meetings with satellites are planned to understand and document deliverables and dependencies (in both directions).

# High-level Goals

## Projects (with Date targets)

1. Year6a work plans for each area – Aug 30
2. Implement capture system for ongoing activities (with metric goals) – Sept 15
3. Baseline year6A work plans for each area and start tracking – Oct 30
4. Year6A SOWs signed and subcontracts initiated – Nov 30
   1. SOW drafts – Sept 30
   2. Sign-off within OSG – Oct 30
   3. Subcontracts from UW-Madison – Nov 30
5. Develop interface plan for docked projects in support of Assoc. ED – Dec 20
6. OSG DOE Final report – April 30
7. OSG NSF Final Report – Sept 30

## Ongoing Tasks

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| --- | --- | --- |
|  | Activity | Measure |
| 1 | Quarterly institutional cost reports and overall budget summary to OSG-ET | Executed within 1-month after end of each quarter; with coverage > 90% of budgeted institutions. |
| 2 | Weekly Area Coordinator Meeting to review work-plan progress (rotating schedule with each Area covered about every 6 weeks) | Each area reviewed with period not to exceed 8 weeks. |
| 3 | Weekly reporting to OSG-ET (based on Area Coordinator meeting) on 1) changes to work plan; or 2) items in jeopardy and needing assistance | Email report to OSG-ET within 2 business days of overall status, recent changes, and items needing attention. |
| 4 | Quarterly Meetings with all satellite projects to coordinate work programs | Email report to OSG-ET within 2 business days of overall status, recent changes, and items needing attention. |
| 5 | Periodic meeting (typically 6-8 weeks) with selected external projects (e.g. CDIGS) to coordinate deliverables and requirements | Email report to OSG-ET within 2 business days of overall status, recent changes, and items needing attention. |

# Staffing Plan

* Chander Sehgal – 70% (Budget, SOWs, internal project tracking/reporting)
* Gabriele Garzoglio – 20% (External projects and satellites, internal project tracking)
* Ginny Werner – as needed (proposals, UW-Madison subcontracts, cost reports)
* Jemise Lockhart – as needed (WBS updates, setup meetings/calls)

# Risks, Concerns & Questions

1. Historically, changes to the OSG work program happen via various forums, including direct interaction between OSG management and area coordinators, and the project manager has not been effective in capturing these changes to the WBS; this was only possible when the Area Coordinators notified the project manager to initiate a WBS update and that usually did not happen in a timely fashion. In our new method, where each Area Coordinator is responsible for keeping their project plan up-to-date, this issue should be greatly diminished but each Area Coordinator will need to allocate some of their time to partnering with the project manager periodically to create documented updates to the area work plans.
2. Satellite projects sometimes have specific work needs from OSG core; what is the expectation (lead time, etc.) on how these needs should be communicated to OSG core and who should carry the budget cost of these changes (e.g. new feature in Gratia or other external projects that budget support for such changes). Since many satellite projects have OSG staff in leadership positions, it is fairly easy for them to access and use OSG staff via informal methods.
3. We need a system to “log” stakeholder requests so that: 1) they don’t get lost, 2) stakeholders have visibility into the status/plans for their request; and 3) we can use it as a management tool to manage priorities and see the overall status as well as status of specific requests.
4. Need to revise tool system to capture on-going tasks with metric targets (probably use the twiki). We will continue to use the current WBS based system for date driven projects.