**OSG Year6 Planning Kickoff**

*Today: Share the overall plan and get feedback*

Timeline

* June 22 – Kickoff
* July 6 – Follow-up phone call (more details, templates, etc.)
* July 26-29 – OSG Planning Retreat
* August: Transform area work plans into specifics to load into “capture system”
* September: SOW drafts to institutions
* Mid-October: Baseline the plan
* November: Start our new methods for reviewing progress, resolving issues, and reporting status

OSG’ Project Management Basics

* Project Management Process at [DocDB 850-v5](http://osg-docdb.opensciencegrid.org/cgi-bin/ShowDocument?docid=850)
* Area Coordinators plan and manage the details of their work plan; share a higher level abstraction (showing deliverables and observable activities) with peers and OSG-ET
* Area Coordinators meet weekly to focus on one area; thus, each area is reviewed in some detail every ~6 weeks (need to pick a weekly timeslot)
  + Present status on project tasks (tracking against dates)
  + Present current metrics for ongoing activities (tracking against metrics)
  + Present specific change proposals
  + Review Issues and Needs

Tools for Capturing & Tracking Plans

* For the Planning Retreat, we should plan to produce two list which describe the work program for each area (specific templates will be available by July 6 meeting):
  + Project Goals (time-bound tasks) along with schedule
  + Ongoing activities along with appropriate metric for each
* Evaluation of JIRA indicates good for tracking issues but not a match for planning/tracking hierarchical project tasks
* By OSG Planning Retreat, we will define and describe the tools to capture the area specific work plans into the “official” project management system

Inputs to Year6 Planning

* Proposal to NSF dated March 7, 2011
* WBS Structure (attached)
* Staffing Plan (attached)

Staff Retreat (July)

* [Logistics and Schedule available in draft](https://twiki.grid.iu.edu/bin/view/Management/OSGStaffRetreat2011)
* Each Area Coordinator recaps their strategic objectives (from proposal)
* Develop and present their specific work plans for year6
  + Project Goals (time-bound tasks); show planned schedule and bullet list of covered requirements (also what is not covered)
  + Ongoing activities along with a measure (for each) that helps us understand how well we are accomplishing that activity (target values for each quarter?)
  + (Include documentation & training plans)
  + Probably no more than a 2-level detail
* In general, the work-plan should to be consistent with staffing but do include items deemed essential for which staff may be deficient (also, identify surplus staff!)
* Talk about the risks to achieving this work program
* Review by peer area coordinators and PIs
* Output is agreed-upon work plan for each area

Detailed Planning and input into work plans “capture system” (August)

* More details by July 26
* List of Project tasks and ongoing activities; show who is responsible for leading and who is supporting each of these work items

SOWs (September)

* Project Manager drafts SOWs for all institutions (BNL, Chicago, Florida, FNAL, Indiana, ISI, Nebraska, UCSD, UIUC, Wisconsin)
* Input to SOWs is staffing plan, budget plan, and outputs from work plans “capture systems”
* Send to PIs for review and sign-off by Sept 30

Baseline the Plan (mid-October)

(More details later)

Tracking/Reporting (November)

(More details later)