**Scope Statement**

**What’s in, how we’ll judge success:**

* **Automate all cost-tracking workflows (FEMA PA/Administrative & Management Costs):**  
  Document current steps (intake → validation → F-ROC review → approvals → reimbursement → archival), map to Jira issue types/statuses, and replace email/Excel handoffs with Jira forms, automations, and SLAs. **Acceptance criteria:** 100% of new AMC work created as Jira issues; no critical path step handled purely by email/spreadsheets.
* **Integrate collaboration, ticketing, dashboards:**  
  One Jira project with swim lanes for *Recurring Ops* vs *New Automations*, custom fields for F-ROC, project/applicant IDs, cost categories, and audit flags; real-time dashboards for throughput, cycle time, aging, SLA breaches, and workload. **KPIs:** 30–40% cycle-time reduction; >90% SLA adherence; <2% rework from handoff errors.
* **Establish SOPs for submission, validation, reporting:**  
  SOPs for: Intake & triage, F-ROC validation, documentation standards, exception handling, change control, dashboard maintenance, and weekly/month-end reporting. **Evidence:** version-controlled SOPs in SharePoint, linked from Jira project sidebar; audit checklist embedded in Jira transitions.

**Work Breakdown Structure (WBS)**

**Purpose, activities, owners, outputs:**

1. **Requirements Gathering** *(Owner: You; Consult: AMC team, Ismael)*  
   Map as-is processes, data fields, pain points; define success metrics and roles. **Outputs:** Process maps, field dictionary, SLA definitions, “to-be” workflow spec.
2. **Jira System Design** *(Owner: You; Consult: IT)*  
   Design project schema (issue types, statuses, screens, fields), permissions, notifications, and labels/components for F-ROC, applicants, disasters, categories. **Outputs:** Config blueprint, permission matrix, naming conventions.
3. **Workflow Configuration** *(Owner: You; Consult: PM, Sponsor)*  
   Build Scrumban board, WIP limits, validators/conditions, automation rules (auto-assign, due-date, SLA timers, auto-transition on approval, email/Webhook). **Outputs:** Live Jira project, tested workflows, SLA calendars.
4. **Dashboard Creation** *(Owner: You)*  
   Management and team dashboards: cumulative flow, control chart, aging by status, SLA breach list, throughput by category, overpayment recovery tracker. **Outputs:** Published dashboards, saved filters, stakeholder views.
5. **Testing & Training** *(Owner: You; R: AMC team)*  
   UAT with real samples: create → validate → approve → archive; measure cycle time; refine fields/automations. **Outputs:** UAT report, defect log, updated config, training deck, quick-reference guides.
6. **SOP Development** *(Owner: You; A: Ismael; C: Carri)*  
   Write step-by-step SOPs with screenshots, roles, timings, checklists, quality gates, and exception paths; include change-control SOP. **Outputs:** Approved SOP pack in SharePoint with version history.
7. **Documentation & Backup Setup** *(Owner: You; C: IT)*  
   Enable weekly Jira project export (JSON/CSV) to SharePoint/OneDrive; set retention; document restore steps; link to audit evidence folder. **Outputs:** Automated backup job, restore playbook, data map.
8. **Rollout** *(A: Ismael; R: You)*  
   Go-live in AMC; cutover plan (freeze window, data seed, communications), hypercare for 2 weeks; define criteria for expanding to other bureaus. **Outputs:** Go-live report, stabilization metrics, scale-out plan.

**Schedule**

**10 weeks total; key dependencies & milestones:**

* **Weeks 1–2 (Planning):** Requirements, design blueprint, approval of scope & KPIs. *Milestones:* M1—Requirements signed off; M2—Design approved.
* **Weeks 3–6 (Execution):** Build Jira config (wk3–4), dashboards (wk5), UAT + training (wk6). *Milestones:* M3—Config complete; M4—Dashboards live; M5—UAT exit.
* **Weeks 7–8 (Execution cont.):** SOP finalization; backup/restore setup; change-control ready. *Milestones:* M6—SOPs approved; M7—Backups validated.
* **Weeks 9–10 (Closure):** Cutover & hypercare, lessons learned, final report, scale plan. *Milestones:* M8—Go-live; M9—Project closure.  
  **Critical path:** Requirements → Design approval → Workflow build → UAT exit → SOP approval → Go-live.  
  **Dependencies:** Jira Premium access, IT permissioning, AMC UAT availability, SharePoint folder & automation.

**Budget & Resources**

**High-level:**

* **Jira Premium subscription:** Seats for 9 AMC + PM + Sponsor + IT (view). Include cost for Automation, Advanced Roadmaps if needed.
* **Internal resourcing:** 20–30% FTE from you (lead), 10–15% per analyst for UAT/training weeks, PM oversight (Ismael).
* **Backup/Storage:** SharePoint/OneDrive capacity for weekly exports + SOPs; optional Power BI Pro if connecting Jira data.  
  **Assumptions:** No custom code in Phase 2; configuration only. **Constraints:** Government change-control; audit traceability; limited UAT windows.

**Risk Register**

**Expanded with triggers, owners, actions:**

1. **User adoption resistance** — *Prob: Medium, Impact: High, Owner: Ismael/You*
   * **Triggers:** Low usage, work done via email, rising SLA breaches.
   * **Mitigation:** Champions in each sub-team; hands-on training; “two-week no-email” pilot; badge KPI on dashboard.
   * **Contingency:** Temporary hybrid process with enforced cutover date; executive nudge from Carri.
2. **Data migration issues** — *Prob: Low, Impact: High, Owner: IT/You*
   * **Triggers:** Field mismatches, failed imports, missing attachments.
   * **Mitigation:** Dry-run in sandbox; field mapping sheet; checksum validation; backup pre-cutover.
   * **Contingency:** Rollback to pre-cutover state; manual re-import SOP; hotfix window with IT.
3. **Dashboard reporting errors** — *Prob: Low, Impact: Medium, Owner: You*
   * **Triggers:** KPI mismatch vs manual counts; stale gadgets; filter errors.
   * **Mitigation:** QA checklist; peer review of JQL/fields; scheduled refresh; test datasets.
   * **Contingency:** Publish “known issues” banner; quick patch window; revert to validated view.

**Communication Plan**

**Cadence, channels, templates:**

* **Weekly progress report → Carri & Ismael (email + link to Jira dashboard):**  
  Status (RAG), achievements, blockers/risks, KPI snapshot (cycle time, SLA, backlog), decisions needed, next-week plan.
* **Daily stand-ups (15 min) with AMC team (Teams/Zoom + Jira board):**  
  Yesterday/Today/Blockers; review WIP limits; triage new tickets; confirm priorities.
* **Jira notifications & rules:**  
  Auto-notify assignee on status changes, SLA breach warnings at T-24h/T-4h, weekly digest to Sponsor/PM, change-control approvals to watchers.
* **Stakeholder reviews:**  
  Bi-weekly with Carri/Ismael to review KPIs, approve changes, confirm scale-out.
* **Docs & Traceability:**  
  All reports/SOPs stored in SharePoint with versioning; links pinned in Jira project sidebar; meeting notes captured in Confluence/SharePoint with action owners & due dates.