

Scope Management Plan

Project Name or Identification

CDI - Viz Dashboard

Prepared by:

Montana Data Consultants

Date:

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Introduction

This document will be used by the Montana Data Consultants in order to manage what is within the scope of the project and what is not within the scope. This document contains the project scope, product scope, scope change request form, and the scope change log.

Scope Statement

Montana Data Consultants will develop an exploratory tool that is easy to interact with and provides users with useful information at a glance. Users will understand why the tool exists and develop their own opinion based on the information provided. This tool will make the public data set being used more manageable and will identify trends by mapping indicators of chronic disease. In addition, this tool will be useful for demonstrating to potential contractors what Morton Analytics' can provide as contractors. If possible, Morton Analytics will be able to upload new data into the exploratory tool.

- Develop an exploratory tool that is easy to interact with.
 - The tool should be clear and comprehensible.
 - The tool should be in an easy to read format, such as in a dashboard or a report.
 - The tool should be performant.
 - Users should understand why the tool exists and what the data represents.
 - Users should be able to glean useful information and develop their own opinions on the data quickly.
 - The tool should demonstrate Morton Analytics' capability and skill in data analysis, engineering, and visualization.
 - If possible, Morton Analytics will be able to upload updated and new data into the tool.
- Possible action items for the dashboard include:
 - Creating a data pipeline to make the data more management with data viz tools
 - Creating a map that can see any chronic disease indicator on any date
 - Creating time series plots to see trends for any chronic disease indicate over time
- Montana Data Consultants will utilize the [U.S. Chronic Disease Indicators Data Set](#) developed by the CDC's Division of Population Health for creating this tool.
- Montana Data Consultants will provide clear documentation of their planning and development processes and will maintain clear communication with Morton Analytics throughout the creation of the performative tool.
- Montana Data Consultants will test the dashboard with at least 50 individuals of various educational and professional backgrounds.
- Montana Data Consultants will present their final product to shareholders in a clear concise presentation that highlights the useability

What is out of Scope

- Montana Data Consultants will not be completing a formal analysis on the data set nor developing any formal conclusions – the tool will assist others in doing that themselves.

- Montana Data Consultants will not be testing a hypothesis - we are not running an analysis or coming to conclusions, only developing a visualization tool.
- This tool does not require a live link to the data set - Morton Analytics specified this and only hopes they can add new data manually.
- Montana Data Consultants will not be providing ongoing maintenance on this tool - it is simply a resource for Morton Analytics to use in their future bids.

Project Oriented Scope

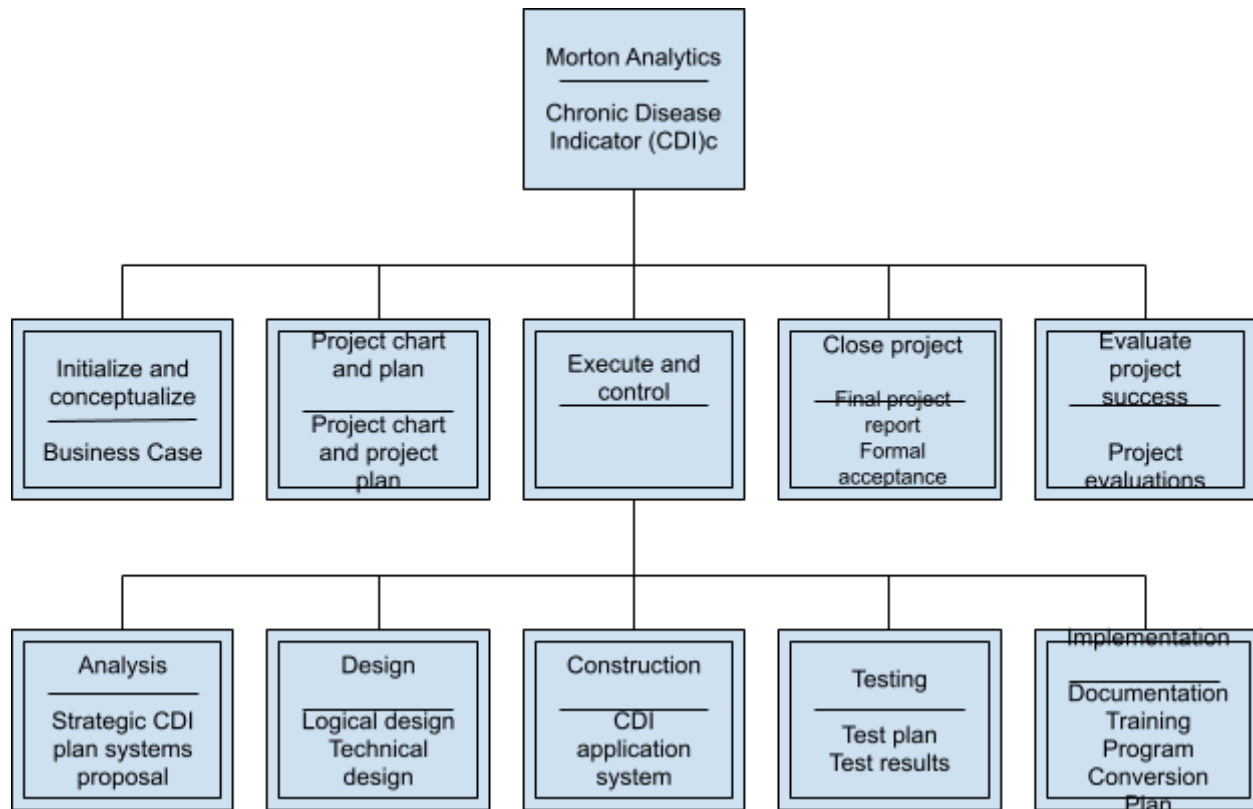
Below you will find the Deliverable Definition Table for this project as well as the Deliverable Structure Chart. The Deliverable Definition Table displays the different phases and deliverables associated with each phase as well as the structure, standards, approval, and resources required for each. The Deliverable Structure Chart is a visual representation that depicts the hierarchical structure of deliverables for this project.

Deliverable Definition Table

Deliverable	Structure	Standards	Approval Needed By:	Resources Required
<u>Phase 1: Initiation</u>				
Project Charter	Document	As defined in project methodology	Project sponsor	Team members
<u>Phase 2: Planning</u>				
MS Project Schedule	Document	As defined in project methodology	Project manager	Montana Data Consultants
Budget	Document	As defined in project methodology	Project manager	Montana Data Consultants
Gantt Chart	Document	As defined in project methodology	Project manager	Montana Data Consultants
PERT Analysis	Document	As defined in project methodology	Project manager	Montana Data Consultants
Risk Management	Document	As defined in	Project manager	Montana Data

Plan		project methodology		Consultants
Project Communications Plan	Document	As defined in project methodology	Project manager	Montana Data Consultants
Project Quality Plan	Document	As defined in project methodology	Project manager	Montana Data Consultants
Change Management Plan	Document	As defined in project methodology	Project sponsor	Montana Data Consultants
<u>Phase 3: Execution</u>				
Systems Documents	Document	As defined in project methodology	Project manager	Montana Data Consultants
Project Progress Report	Document	As defined in project methodology	Project sponsor	Montana Data Consultants
<u>Phase 4: Closing</u>				
Final Project Presentation	Document	As defined in project methodology	Project manager	Montana Data Consultants
Final Project Report	Document	As defined in project methodology	Project manager	Montana Data Consultants
Final Submission of Project Book	Document	As defined in project methodology	Project manager	Montana Data Consultants

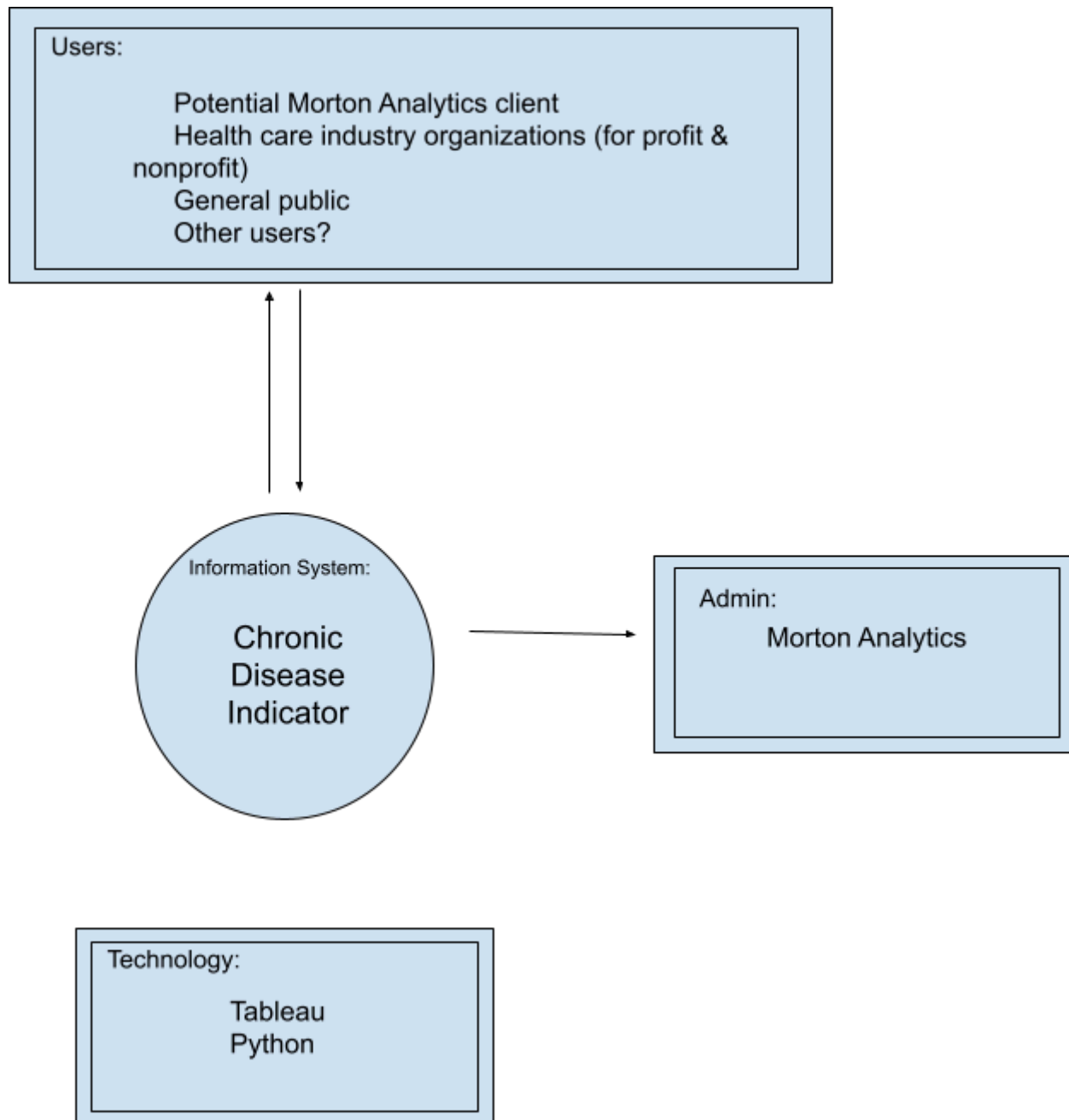
Deliverable Structure Chart



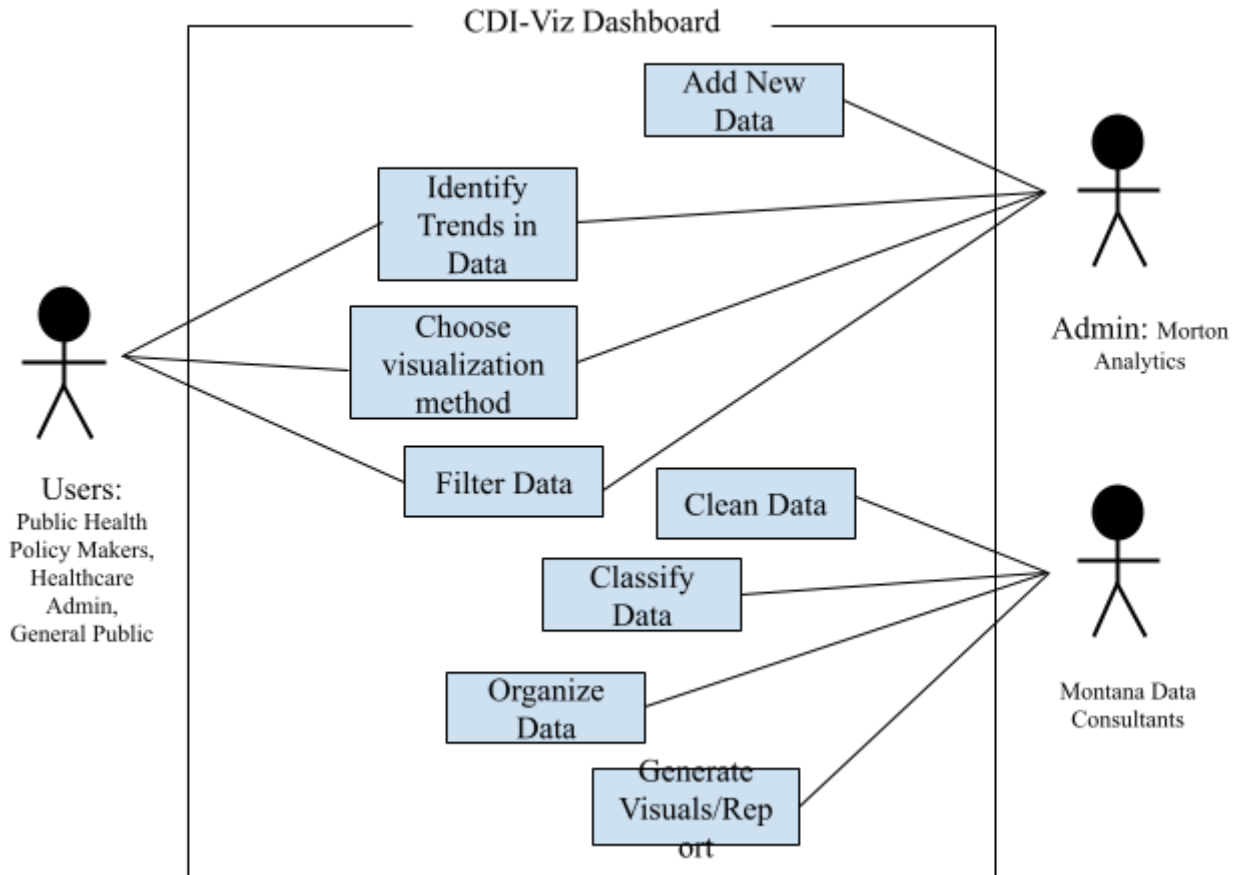
Product Oriented Scope

Below you will find the Context Level Data Flow and Use Case diagrams we will follow for this project. The Context Level Data Flow diagram is a visual representation of the process of what external and internal entities will interact with the product and how data will flow between each. The Use Case diagram represents the interactions between the different users of the product. It provides an overview of the different use scenarios of the final product as well as the requirements necessary for it to function.

Context Level Data Flow Diagram



Use Case Diagram



Scope Change Request Form

Montana Data Consultants Scope Change Control Process:

1. Recording the Request:

- Upon receiving a request for a change in the project scope, the Montana Data Consultants team will promptly add the request to the Scope Change Request Log.

2. Scope Change Control Form:

- Sponsors intending to propose a major change in the project scope must fill out the Scope Change Control form. This form ensures that all necessary information regarding the proposed change is provided.

3. Process for Addressing the Request:

- Once the Scope Change Control form is received, the project manager will initiate the evaluation process.

- The project manager will review the proposed change alongside the project team to assess its feasibility, impacts, and implications on scope, schedule, resources, and cost.

4. Delivery of the Form:

- Sponsors are required to submit the completed Scope Change Control form directly to the project manager.
- The preferred method of delivery is via email to ensure timely receipt and processing.

5. Decision Timeframe:

- The project manager will strive to make a decision on the change request promptly.
- The exact time taken for a decision will depend on the complexity of the proposed change.
- Generally, decisions on scope change requests will be made within 5 business days of receiving the completed Scope Change Control form.

Scope Change Request Form

Requester Name: _____

Request Date: _____

Request Title: _____

Request Number: _____

Request Description:

Justification:

Possible Alternatives:

<u>Impacts</u>	<u>Alternative 1</u>	<u>Alternative 2</u>	<u>Alternative 3</u>
<u>Scope</u>			
<u>Schedule</u>			
<u>Resources Required</u>			
<u>Cost</u>			

Recommendations:

Authorized By:

Date:

Scope Change Request Log

The Montana Data Consultants will be monitoring the Scope Change Request Log below on a weekly basis on Wednesdays. Any change requests that are received will be logged below.

Request Number	Request Title	Date of Request	Requested by	Priority (L, M, H)	Authority to approve Request	Expected Response Date	Scope Change Approved (Y/N)