**Project Charter Plan**

**2020 Election Dashboards**

**Sonny Desai**

**182 Garden gate Lane**

**Irvine, CA 92620**

**06/28/2020**

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# Executive Summary

This current year, 2020. Is a general election year and the United States will decide its president for the next 4 years. Although the race is still wide open, it will be important to view the breakdowns of the polls by state. National and state polls will be crucial for determining strategy of political ads and campaign energy. This project will give detailed reporting of the polls by creating a dashboard visualization of the polling data, its changes, and trends in the run up to the election. Along with the 50 state polls, a national poll will be followed, along with the president’s approval poll, and polling amongst certain categories and sub groups that will factor into the election.

# Project Purpose/Justification

## Business Need/Case

This project has been created to help formulate political strategy and understand complex data, especially polling data, per state, in clear visualizations and storytelling form

## Business Objectives

The business objectives for this project are to help with strategy, visualizing, and analyzing data.

* Create a dashboard for visualizations for all 50 states polls
* Show national poll
* Visualize variance from week to week

# Project Description

This project will show a dashboard which will include a visualization for national polls between the two candidates, visualizations of polls for all 50 states, and the president’s approval ratings. Variance will be calculated weekly for all of the polls where data is attainable, showing variance from week to week.

## Project Objectives and Success Criteria

The objectives which mutually support the milestones and deliverables for this project have been identified. In order to achieve success on the project, the following objectives must be met within the designated time and budget allocations:

* Obtain data source(s) for polling data and approval polls
* Create database or central storage are for data
* Complete list of required hardware/software which meets budget allocation within the next 25 days
* Implement the solution across the organization within the next 120 days

## Requirements

This project must meet the following list of requirements in order to achieve success.

* The database must be created before creation of visualizations. Data quality assurance must also be done
* Available data sources
* Data visualization tool (Power BI)
* Solution must be implemented without disruption to operations

Additional requirements may be added as necessary, with project sponsor approval, as the project moves forward.

## Constraints

The following constraints pertain to the project:

* All security hardware and software must be compatible with our current IT platforms
* All hardware and software must be purchased in accordance with the allocated budget and timeline

## Assumptions

The following are a list of assumptions. Upon agreement and signature of this document, all parties acknowledge that these assumptions are true and correct:

* This project has the full support of the project sponsor, stakeholders, and all departments
* The purpose of this project will be communicated throughout the company prior to deployment
* The election this year will go forward as planned and will not be delayed or canceled due to covid-19

## Preliminary Scope Statement

This project will include gathering of various data sources of polling data regarding the 2020 election that will be stored in a database. The database will be created in a sql platform most likely mysql. From there, the data will go through a QA test to ensure data quality by matching it against other sources. Then visualizations will be created in a visualization tool, most likely power bi. The visualizations will be one fore each of the 50 states in the United States, a national poll, and the president’s approval rating. Variance or changes will be noted in the visualizations and will be calibrated by updating the database from various data sources.

# Risks

The following risks for the ISA project have been identified. The project manager will determine and employ the necessary risk mitigation/avoidance strategies as appropriate to minimize the likelihood of these risks:

* The lack of arability of data – either it is difficult to get or reliable data sources cannot be confirmed
* The election could be either canceled or delayed for which it will be difficult to achieve the desired outcomes

# Project Deliverables

The following deliverables must be met upon the successful completion of the ISA project. Any changes to these deliverables must be approved by the project sponsor.

* Fully deployed dashboard with all visualizations
* Visualizations of polling data of all 50 states and presidents approval
* Variance calculations of changes between polls per week

# Summary Milestone Schedule

The project Summary Milestone Schedule is presented below. As requirements are more clearly defined this schedule may be modified. Any changes will be communicated through project status meetings by the project manager.

|  |  |
| --- | --- |
| **Summary Milestone Schedule – List key project milestones relative to project start.** | |
| **Project Milestone** | **Target Date (mm/dd/yyyy)** |
| 1. Project Start | 06/28/2020 |
| * Data Source Requirements | 07/05/2020 |
| 1. Database creation | 07/12/2020 |
| 1. Visualizations and Dashboard creation | 07/19/2020 |
| 1. Updating and validation | 07/26/2020 |
| 1. Updating and Validation | 08/02/2020 |
| 1. Project Complete | 08/30/2020 |

# Summary Budget

The following table contains a summary budget based on the planned cost components and estimated costs required for successful completion of the project.

|  |  |
| --- | --- |
| **Summary Budget – List component project costs** | |
| **Project Component** | **Component Cost** |
| 1. Personnel Resources | $100 |
| * Hardware | $100 |
| 1. Software and Licensing | $100 |
| 1. IT Lab Preparation | $100 |
| **Total** | **$400** |

# Project Approval Requirements

Success for the project will have functioning and updatable data sources that will feed into a database. From this database, QA and validation must be done to ensure data quality. Visualizations will also be created from a direct link to the database. The pertinent visualizations: all 50 states, the president’s approval, and further categories ie racial or demographic breakdowns will be held in the dashboard. The visualizations will be updated weekly and the variance from previous weeks will be shown.

# Project Manager

Sonny Desai is named Project Manager for the duration of the Project. Mr. Desai’s responsibility is to manage all project tasks, scheduling, and communication regarding the project. Mr. Desai is authorized to approve all budget expenditures up to, and including, the allocated budget amounts.

# Authorization

Approved by the Project Sponsor:

Date:

<Project Sponsor>

<Project Sponsor Title>

**Communication Management Plan**

**2020 Election Dashboards**

**Sonny Desai**

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**06/28/2020**

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# Introduction

This Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication needs change. This plan identifies and defines the roles of persons involved in this project. It also includes a communications matrix which maps the communication requirements of this project. An in-depth guide for conducting meetings details both the communications rules and how the meetings will be conducted, ensuring successful meetings. A project team directory is included to provide contact information for all stakeholders directly involved in the project.

# Communications Management Approach

The Project Manager will take a proactive role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix presented in this document. The Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it and to whom to communicate.

As with most project plans, updates or changes may be required as the project progresses or changes are approved. Changes or updates may be required due to changes in personnel, scope, budget, or other reasons. Additionally, updates may be required as the project matures and additional requirements are needed. The project manager is responsible for managing all proposed and approved changes to the communications management plan. Once the change is approved, the project manager will update the plan and supporting documentation and will distribute the updates to the project team and all stakeholders. This methodology is consistent with the project’s Change Management Plan and ensures that all project stakeholders remain aware and informed of any changes to communications management.

# Communications Management Constraints

All project communication activities will occur within the project’s approved budget, schedule, and resource allocations. The project manager is responsible for ensuring that communication activities are performed by the project team and without external resources which will result in exceeding the authorized budget. Communication activities will occur in accordance with the frequencies detailed in the Communication Matrix in order to ensure the project adheres to schedule constraints. Any deviation of these timelines may result in excessive costs or schedule delays and must be approved by the project sponsor.

# Stakeholder Communication Requirements

As part of identifying all project stakeholders, the project manager will communicate with each stakeholder in order to determine their preferred frequency and method of communication. This feedback will be maintained by the project manager in the project’s Stakeholder Register. Standard project communications will occur in accordance with the Communication Matrix; however, depending on the identified stakeholder communication requirements, individual communication is acceptable and within the constraints outlined for this project.

In addition to identifying communication preferences, stakeholder communication requirements must identify the project’s communication channels and ensure that stakeholders have access to these channels. If project information is communicated via secure means or through internal company resources, all stakeholders, internal and external, must have the necessary access to receive project communications.

Once all stakeholders have been identified and communication requirements are established, the project team will maintain this information in the project’s Stakeholder Register and use this, along with the project communication matrix as the basis for all communications.

# Roles

**Project Sponsor**

The project sponsor is the champion of the project and has authorized the project by signing the project charter. This person is responsible for the funding of the project and is ultimately responsible for its success. Since the Project Sponsor is at the executive level communications should be presented in summary format unless the Project Sponsor requests more detailed communications.

**Program Manager**

The Program Manager oversees the project at the portfolio level and owns most of the resources assigned to the project. The Program Manager is responsible for overall program costs and profitability as such they require more detailed communications than the Project Sponsor.

**Key Stakeholders**

Normally Stakeholders includes all individuals and organizations who are impacted by the project. For this project we are defining a subset of the stakeholders as Key Stakeholders. These are the stakeholders with whom we need to communicate with and are not included in the other roles defined in this section. The Key Stakeholders includes executive management with an interest in the project and key users identified for participation in the project.

**Change Control Board**

The Change Control Board is a designated group which is reviews technical specifications and authorizes changes within the organizations infrastructure. Technical design documents, user impact analysis and implementation strategies are typical of the types of communication this group requires.

**Customer**

The customer for this project is ABC Corp. As the customer who will be accepting the final deliverable of this project they will be informed of the project status including potential impacts to the schedule for the final deliverable or the product itself.

**Project Manager**

The Project Manager has overall responsibility for the execution of the project. The Project Manager manages day to day resources, provides project guidance and monitors and reports on the projects metrics as defined in the Project Management Plan. As the person responsible for the execution of the project, the Project Manager is the primary communicator for the project distributing information according to this Communications Management Plan.

**Project Team**

The Project Team is comprised of all persons who have a role performing work on the project. The project team needs to have a clear understanding of the work to be completed and the framework in which the project is to be executed. Since the Project Team is responsible for completing the work for the project they played a key role in creating the Project Plan including defining its schedule and work packages. The Project Team requires a detailed level of communications which is achieved through day to day interactions with the Project Manager and other team members along with weekly team meetings.

**Steering Committee**

The Steering Committee includes management representing the departments which make up the organization. The Steering Committee provides strategic oversight for changes which impact the overall organization. The purpose of the Steering Committee is to ensure that changes within the organization are effected in such a way that it benefits the organization as a whole. The Steering Committee requires communication on matters which will change the scope of the project and its deliverables.

**Technical Lead**

The Technical Lead is a person on the Project Team who is designated to be responsible for ensuring that all technical aspects of the project are addressed and that the project is implemented in a technically sound manner. The Technical Lead is responsible for all technical designs, overseeing the implementation of the designs and developing as-build documentation. The Technical Lead requires close communications with the Project Manager and the Project Team.

# Project Team Directory

The following table presents contact information for all persons identified in this communications management plan. The email addresses and phone numbers in this table will be used to communicate with these people.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Role** | **Name** | **Title** | **Organization/ Department** | **Email** | **Phone** |
| **Project Sponsor** |  |  |  |  |  |
| **Program Manager** | Sonny Desai | Project Manager | Data Science | [Sjdesai87@gmail.com](mailto:Sjdesai87@gmail.com) | (310) 869-1121 |
| **Project Manager** |  |  |  |  |  |
| **Project Stakeholders** | See Stakeholder Register | See Stakeholder Register | See Stakeholder Register | See Stakeholder Register | See Stakeholder Register |
| **Customer** | J. Doe ABC Corp | Manager | IT | [J.Doe@xyz.com](mailto:J.Doe@xyz.com) | (615) 555-8121 |
| **Project Team** |  |  |  |  |  |
| **Technical Lead** |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

# Communication Methods and Technologies

The project team will determine, in accordance with ABC Corp. organizational policy, the communication methods and technologies based on several factors to include: stakeholder communication requirements, available technologies (internal and external), and organizational policies and standards.

ABC Corp. maintains a SharePoint platform within the PMO which all projects use to provide updates, archive various reports, and conduct project communications. This platform enables senior management, as well as stakeholders with compatible technology, to access project data and communications at any point in time. SharePoint also provides the ability for stakeholders and project team members to collaborate on project work and communication.

For stakeholders who do not have the ability to access SharePoint, a web site will also be established for the project. Access to the website will be controlled with a username and password. Any stakeholders identified who are not able to access SharePoint will be issued a unique username and password in order to access the web site. The project manager is responsible for ensuring all project communications and documentation are copied to the web site and that the content mirrors what is contained on the SharePoint platform.

ABC Corp. maintains software licenses for MS Project software. All project teams are responsible for developing, maintaining, and communicating schedules using this software. PERT Charts are the preferred format for communicating schedules to stakeholders. The project schedule will be maintained on both the SharePoint platform and the project website.

All project communication and documentation, in addition to being maintained on the SharePoint platform and project website, will be archived on the internal ABC Corp. shared drive which resides in the PMO program directory. Organizational naming conventions for files and folder will be applied to all archived work.

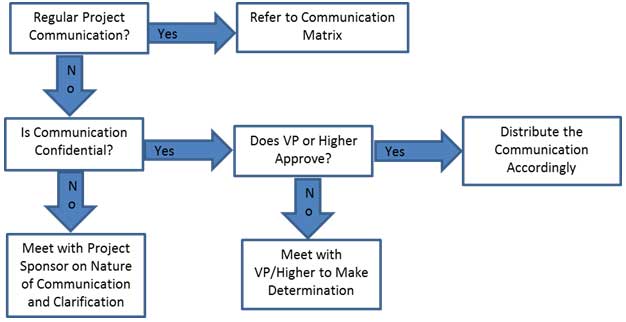
# Communications Matrix

The following table identifies the communications requirements for this project.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Communication Type** | **Objective of Communication** | **Medium** | **Frequency** | **Audience** | **Owner** | **Deliverable** | **Format** |
| Kickoff Meeting | Introduce the project team and the project. Review project objectives and management approach. | * Face to Face | Once | * Project Sponsor * Project Team * Stakeholders | Project Manager | * Agenda * Meeting Minutes | * Soft copy archived on project SharePoint site and project web site |
| Project Team Meetings | Review status of the project with the team. | * Face to Face * Conference Call | Weekly | * Project Team | Project Manager | * Agenda * Meeting Minutes * Project schedule | * Soft copy archived on project SharePoint site and project web site |
| Technical Design Meetings | Discuss and develop technical design solutions for the project. | * Face to Face | As Needed | * Project Technical Staff | Technical Lead | * Agenda * Meeting Minutes | * Soft copy archived on project SharePoint site and project web site |
| Monthly Project Status Meetings | Report on the status of the project to management. | * Face to Face * Conference Call | Monthly | * PMO | Project Manager | * Slide updates * Project schedule | * Soft copy archived on project SharePoint site and project web site |
| Project Status Reports | Report the status of the project including activities, progress, costs and issues. | * Email | Monthly | * Project Sponsor * Project Team * Stakeholders * PMO | Project Manager | * Project Status Report * Project schedule | * Soft copy archived on project SharePoint site and project web site |

# Communication Flowchart

The communication flowchart below was created to aid in project communication. This flowchart provides a framework for the project team to follow for this project. However, there may be occasions or situations which fall outside of the communication flowchart where additional clarification is necessary. In these situations the Project Manager is responsible for discussing the communication with the Project Sponsor and making a determination on how to proceed.



# Guidelines for Meetings

**Meeting Agenda**

Meeting Agenda will be distributed 5 business days in advance of the meeting. The Agenda should identify the presenter for each topic along with a time limit for that topic. The first item in the agenda should be a review of action items from the previous meeting.

**Meeting Minutes**

Meeting minutes will be distributed within 2 business days following the meeting. Meeting minutes will include the status of all items from the agenda along with new action items and the Parking Lot list.

**Action Items**

Action Items are recorded in both the meeting agenda and minutes. Action items will include both the action item along with the owner of the action item. Meetings will start with a review of the status of all action items from previous meetings and end with a review of all new action items resulting from the meeting. The review of the new action items will include identifying the owner for each action item.

**Meeting Chair Person**

The Chair Person is responsible for distributing the meeting agenda, facilitating the meeting and distributing the meeting minutes. The Chair Person will ensure that the meeting starts and ends on time and that all presenters adhere to their allocated time frames.

**Note Taker**

The Note Taker is responsible for documenting the status of all meeting items, maintaining a Parking Lot item list and taking notes of anything else of importance during the meeting. The Note Taker will give a copy of their notes to the Chair Person at the end of the meeting as the Chair Person will use the notes to create the Meeting Minutes.

**Time Keeper**

The Time Keeper is responsible for helping the facilitator adhere to the time limits set in the meeting agenda. The Time Keeper will let the presenter know when they are approaching the end of their allocated time. Typically a quick hand signal to the presenter indicating how many minutes remain for the topic is sufficient.

**Parking Lot**

The Parking Lot is a tool used by the facilitator to record and defer items which aren’t on the meeting agenda; however, merit further discussion at a later time or through another forum.

A parking lot record should identify an owner for the item as that person will be responsible for ensuring follow-up. The Parking Lot list is to be included in the meeting minutes.

# Communication Standards

For this project, ABC Corp. will utilize standard organizational formats and templates for all formal project communications. Formal project communications are detailed in the project’s communication matrix and include:

Kickoff Meeting – project team will utilize ABC Corp. standard templates for meeting agenda and meeting minutes. Additionally, any slides presented will use the ABC Corp. standard slideshow template.

Project Team Meetings – project team will utilize ABC Corp. standard templates for meeting agenda and meeting minutes. Additionally, any slides presented will use the ABC Corp. standard slideshow template.

Technical Design Meetings - project team will utilize ABC Corp. standard templates for meeting agenda and meeting minutes. Additionally, any slides presented will use the ABC Corp. standard slideshow template.

Monthly Project Status Meetings - project team will utilize ABC Corp. standard templates for meeting agenda and meeting minutes. Additionally, any slides presented will use the ABC Corp. standard slideshow template.

Project Status Reports – project team will utilize ABC Corp. standard templates for meeting agenda and meeting minutes. Additionally the standard project status report document, available on the share drive, will be used to provide project status.

Informal project communications should be professional and effective but there is no standard template or format that must be used.

# Communication Escalation Process

Efficient and timely communication is the key to successful project completion. As such, it is imperative that any disputes, conflicts, or discrepancies regarding project communications are resolved in a way that is conducive to maintaining the project schedule, ensuring the correct communications are distributed, and preventing any ongoing difficulties. In order to ensure projects stay on schedule and issues are resolved, ABC Corp. will use its standard escalation model to provide a framework for escalating communication issues. The table below defines the priority levels, decision authorities, and timeframes for resolution.

|  |  |  |  |
| --- | --- | --- | --- |
| **Priority** | **Definition** | **Decision Authority** | **Timeframe for Resolution** |
| Priority 1 | Major impact to project or business operations. If not resolved quickly there will be a significant adverse impact to revenue and/or schedule. | Vice President or higher | Within 4 hours |
| Priority 2 | Medium impact to project or business operations which may result in some adverse impact to revenue and/or schedule. | Project Sponsor | Within one business day |
| Priority 3 | Slight impact which may cause some minor scheduling difficulties with the project but no impact to business operations or revenue. | Project Manager | Within two business days |
| Priority 4 | Insignificant impact to project but there may be a better solution. | Project Manager | Work continues and any recommendations are submitted via the project change control process |

\*\* NOTE: Any communication including sensitive and/or confidential information will require escalation to VP level or higher for approval prior to external distribution.

# Glossary of Communication Terminology

|  |  |
| --- | --- |
| Term | Definition |
| Communication | The effective sending and receiving of information. Ideally, the information received should match the information sent. It is the responsibility of the sender to ensure this takes place. |
| Stakeholder | Individuals or groups involved in the project or whose interests may be affected by the project’s execution or outcome. |
| Communications Management Plan | Portion of the overall Project Management Plan which details how project communications will be conducted, who will participate in communications, frequency of communications, and methods of communications. |
| Escalation | The process which details how conflicts and issues will be passed up the management chain for resolution as well as the timeframe to achieve resolution. |
|  |  |

**Stakeholder Management Strategy**

**2020 Election Dashboards**

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**06/28/2020**

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# Introduction

The Stakeholder Management Strategy for 2020 Election Dashboards Project will be used to identify and classify project stakeholders; determine stakeholder power, interest, and influence; and analyze the management approach and communication methodology for project stakeholders. This will allow us to identify key influential stakeholders to solicit input for project planning and gain support as the project progresses. This will benefit the project by minimizing the likelihood of encountering competing objectives and maximizing the resources required to complete the project.

Early identification and communication with stakeholders is imperative to ensure the success of the Dashboards Project by gaining support and input for the project. Some stakeholders may have interests which may be positively or negatively affected by the Dashboards Project. By initiating early and frequent communication and stakeholder management, we can more effectively manage and balance these interests while accomplishing all project tasks.

# Identify Stakeholders

The Dashboards Project Team will conduct a brainstorming session in order to identify stakeholders for the project. The brainstorming session will include the primary project team and project sponsor. The session will be broken down into two parts. The first part will focus on internal stakeholders within ABC Corp. These stakeholders may include functional managers, operations personnel, finance personnel, warehouse and material handlers, and any other ABC Corp employee who will be affected by the Dashboards project. The second part of the session will focus on external stakeholders. These may include suppliers, trial customers, partner organizations, or any other individuals who reside outside of ABC Corp.

The following criteria will be used to determine if an individual will be included as a stakeholder:

1. Will the person or their organization be directly or indirectly affected by this project?
2. Does the person or their organization hold a position from which they can influence the project?
3. Does the person have an impact on the project’s resources (material, personnel, funding)?
4. Does the person or their organization have any special skills or capabilities the project will require?
5. Does the person potentially benefit from the project or are they in a position to resist this change?

Any individual who meets one or more of the above criteria will be identified as a stakeholder. Stakeholders from the same organization will be grouped in order to simplify communication and stakeholder management.

# Key Stakeholders

As a follow on to Identify Stakeholders, the project team will identify key stakeholders who have the most influence on the project or who may be impacted the most by it. These key stakeholders are those who also require the most communication and management which will be determined as stakeholders are analyzed. Once identified, the Project Manager will develop a plan to obtain their feedback on the level of participation they desire, frequency and type of communication, and any concerns or conflicting interests they have.

Based on the feedback gathered by the project manager, the determination may be made to involve key stakeholders on steering committees, focus groups, gate reviews, or other project meetings or milestones. Thorough communication with key stakeholders is necessary to ensure all concerns are identified and addressed and that resources for the project remain available.

# Stakeholder Analysis

Once all Dashboard Project stakeholders have been identified, the project team will categorize and analyze each stakeholder. The purpose of this analysis is to determine the stakeholders’ level of power or influence, plan the management approach for each stakeholder, and to determine the appropriate levels of communication and participation each stakeholder will have on the project.

The project team will categorize stakeholders based on their organization or department. Once all stakeholders have been categorized, the project team will utilize a power/interest matrix to illustrate the potential impact each stakeholder may have on the project. Based on this analysis the project team will also complete a stakeholder analysis matrix which illustrates the concerns, level of involvement, and management strategy for each stakeholder.

The chart below will be used to establish stakeholders and their levels of power and interest for use on the power/interest chart as part of the stakeholder analysis.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Key | Organization | Name | Power (1-5) | Interest (1-5) |
| A | Operations | S. Desai | 2 | 2 |
| B | Operations |  | 4 | 5 |
| C | Supplier |  | 1 | 1 |
| D | Supplier |  | 1 | 2 |
| E | Trial Customer |  | 3 | 5 |
| F | Engineering |  | 4 | 1 |
| G | Engineering |  | 2 | 4 |
|  |  |  |  |  |

Below is the power/interest chart for the Dashboards Project stakeholders. Each letter represents a stakeholder in accordance with the key in the chart above.



Based on the power and interest analysis and chart above, stakeholders A, C, and D will require minimal management effort as they reside in the lower left quadrant of the matrix. Stakeholder F, in the upper left quadrant, must be kept satisfied by ensuring concerns and questions are addressed adequately. Stakeholder G, in the lower right quadrant, must be kept informed through frequent communication on project status and progress. Stakeholders B and E, in the upper right quadrant, are key players and must be involved in all levels of project planning and change management. Additionally, stakeholders B and E should be participatory members in all project status meetings, gate reviews, and ad hoc meetings as required.

The stakeholder analysis matrix will be used to capture stakeholder concerns, level of involvement, and management strategy based on the stakeholder analysis and power/interest matrix above. The stakeholder analysis matrix will be reviewed and updated throughout the project’s duration in order to capture any new concerns or stakeholder management strategy efforts.

|  |  |  |  |
| --- | --- | --- | --- |
| Stakeholder | Concerns | Quadrant | Strategy |
| A | Ensuring proper handover of project to operations team | Minimal Effort | Communicate project specifications as required |
| B | Resource and scheduling constraints for production once project is transitioned to operations | Key Player | Solicit stakeholder as member of steering committee and obtain feedback on project planning. Frequent communication and addressing concerns are imperative |
| C | Ensuring on time delivery of materials | Minimal Effort | Communicate project schedule and material requirements ahead of time to ensure delivery |
| D | Possible union strike may impact material delivery | Minimal Effort | Solicit frequent updates and develop plan for alternative supply source |
| E | Product performance must meet or exceed current product | Key Player | Communicate test results and performance specifications and obtain feedback on customer requirements or any changes. Provide frequent status reports and updates. |
| F | Concerns regarding resources to assist project team with product design | Keep Satisfied | Communicate resource requirements early and ensure resources are released back to engineering when they’re no longer required |
| G | Questions regarding design of Dashboard product | Keep Informed | Allow technical staff to work with stakeholder to answer questions and address concerns and provide test results for validation |

# 

**Project Scope Statement**

**2020 Election Dashboards**

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**07/05/2020**

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# Introduction

This Project Scope Statement serves as a baseline document for defining the scope of the 2020 US Elections Dashboard Project, project deliverables, work which is needed to accomplish the deliverables, and ensuring a common understanding of the project’s scope among all stakeholders. All project work should occur within the framework of the project scope statement and directly support the project deliverables. Any changes to the scope statement must be vetted through the approved Project Change Management Process prior to implementation. This completion date for this project is 8/28/2020.

# Project Purpose and Justification

The Dashboard Project has been approved to collect relevant and pertinent data, construct a database to hold said data, create report visualizations for polling data for all 50 states, the president’s approval rating, economic indicators, and demographic data. The database will then be linked to the visualizations directly and offer weekly refresh of visualization of the data. The visualizations will be pinned to a select few dashboard based on category type, and the dashboard will be deployed for viewing. The purpose of the project is to help visualize complex and broad data in more simpler and narrower terms, and to provide analysis for which campaigns can then adjust their strategy based upon data outcomes.

# Scope Description

The scope of the Dashboards Project is to collect relevant and pertinent data, construct a database to hold said data, create report visualizations for polling data for all 50 states, the president’s approval rating, economic indicators, and demographic data. The database will then be linked to the visualizations directly and offer weekly refresh of visualization of the data. The visualizations will be pinned to a select few dashboard based on category type, and the dashboard will be deployed for viewing. The scope of this project includes all requirements gathering, planning, design, development, and implementation of the Dashboards.

# High Level Requirements

The Dashboards have been approved to meet a business need for ABC Corp. In order to meet this business need there are several requirements which must be met as part of the successful execution of this project. The following high level requirements have been identified for the Dashboard Project Project:

* Database for central data collection
* Data sources
* Data visualization tool
* Site for deployment of dashboard

# Boundaries

The DASHBOARDS Project includes all work associated with planning, designing, building, and implementing the DASHBOARDS Tool for ABC Corp. This includes requirements gathering, gathering input from all departments, conceptual and technical design and coding work, server configuration, testing, troubleshooting, and deployment of the DASHBOARDS across the organization. This also includes training manuals and materials associated with operating the Dashboards. Not included in the scope of this project are: ongoing maintenance of the system, implementing commercial database products, ongoing help desk and/or service support, or hardware/software upgrades.

# Strategy

For the DASHBOARDS Project strategy, the project team will leverage the expertise of several database developers from the ABC Corp Information Technology (IT) group. These experts will be in matrixed support as part of the project team. They will aid the project manager and other team members in conceptual and technical design, coding, server configuration, testing and troubleshooting, and deployment. The project manager will ensure that the IT experts incorporate all input from stakeholders and gathered requirements.

# Deliverables

There are several deliverables which will be produced as a result of the successful completion of the DASHBOARDS Project. If all of the following deliverables are not met then the project will not be considered successful. The Project Manager is responsible for ensuring the completion of these deliverables.

1. Deliverable 1 – A tested and operational Program Management Database tool free of errors and meeting the specifications described in the Project Scope Description
2. Deliverable 2 – Tested and operational reports visualizations which will be correctly linked to the database
3. Deliverable 3 – Dashboards showing the various visualizations categorized by 50 states, president approval etc

# Acceptance Criteria

Acceptance criteria have been established for the DASHBOARDS Project to ensure thorough vetting and successful completion of the project. The acceptance criteria are both qualitative and quantitative in nature. All acceptance criteria must be met in order to achieve success for this project:

1. Meet all deliverables within scheduled time and budget tolerances
2. Reduce schedule delays by at least 30%
3. Reduce budget overruns by at least 30%
4. Improve ABC Corp’s resource allocation ability
5. Accomplish an overall performance improvement in program metrics

# Constraints

Several constraints have been identified for the DASHBOARDS Project. It is imperative that considerations be made for these constraints throughout the project lifecycle. All stakeholders must remain mindful of these constraints as they must be carefully planned for to prevent any adverse impacts to the project’s schedule, cost, or scope. The following constraints have been identified for the DASHBOARDS Project:

1. IT experts will only work 50% of billable hours on this project
2. Project manager will only work 75% of billable hours on this project
3. The Project Manager working only 75% of billable hours on this project is adequate to complete the project by 8/28/2020
4. The DASHBOARDS Project has full support from senior management across all departments within ABC Corp

# Cost Estimate

The estimated costs for this project are included in the table below. As the project proceeds and any additional costs become known, this cost estimate will be refined and communicated to all project stakeholders.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Expense** | **Estimated Budget** | **Expended to Date** | **Estimate to Complete** | **Variance** |
| Labor |  |  |  |  |
| Internal | $100 | $0 | $0 | +/- $0 |
| External | $100 | $0 | $0 | N/A |
| Software | $100 | $0 | $0 | N/A |
| Hardware | $100 | $0 | $0 | N/A |
| Other | $100 | $0 | $0 | +/- $0 |
| Total | $500 | $0 | $0 |  |

# Cost Benefit Analysis

A cost benefit analysis has been performed for the DASHBOARDS Project. The successful completion of this project will provide significant benefits to ABC Corp. It is imperative that all stakeholders understand these benefits as well as the importance of the successful completion of this project.

|  |  |  |
| --- | --- | --- |
|  | With DASHBOARDS Project | Without DASHBOARDS Project |
| Costs of Project |  |  |
| Recurring Cost | $0 | $0 |
| Non-Recurring Cost | $0 | $0 |
| Capital Costs | $0 | $0 |
| **Total Cost of DASHBOARDS Project** | **$0** | **$0** |
|  |  |  |
| Benefits (1 year) |  |  |
| Reduce Delays by 30% | $0 | -$0 |
| Reduce Overruns by 30% | $0 | -$0 |
| Improve Resource Allocation | $0 | -$0 |
| **Total Benefits of DASHBOARDS Project** | **$0** | **-$0** |
|  |  |  |
| **Net Benefits of DASHBOARDS Project** | $0 | -$0 |
|  |  |  |

Sponsor Acceptance

Approved by the Project Sponsor:

Date:

<Project Sponsor>

<Project Sponsor Title>

**Statement of Work (SOW)**

**2020 Election Dashboards**

**Sonny Desai**

**182 Garden gate Lane**

**Irvine, CA 92620**

**07/05/2020**

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# Introduction/Background

This current year, 2020. Is a general election year and the United States will decide its president for the next 4 years. Although the race is still wide open, it will be important to view the breakdowns of the polls by state. National and state polls will be crucial for determining strategy of political ads and campaign energy. This project will give detailed reporting of the polls by creating a dashboard visualization of the polling data, its changes, and trends in the run up to the election. Along with the 50 state polls, a national poll will be followed, along with the president’s approval poll, and polling amongst certain categories and sub groups that will factor into the election. This project will show a dashboard which will include a visualization for national polls between the two candidates, visualizations of polls for all 50 states, and the president’s approval ratings. Variance will be calculated weekly for all of the polls where data is attainable, showing variance from week to week.

# Scope of Work

The scope of the Dashboards Project is to collect relevant and pertinent data, construct a database to hold said data, create report visualizations for polling data for all 50 states, the president’s approval rating, economic indicators, and demographic data. The database will then be linked to the visualizations directly and offer weekly refresh of visualization of the data. The visualizations will be pinned to a select few dashboard based on category type, and the dashboard will be deployed for viewing. The scope of this project includes all requirements gathering, planning, design, development, and implementation of the Dashboards.

# Period of Performance

The period of performance for the Website Redesign Project is 3 months (90 days) beginning on 22 June 2020 through 31 August 2020. All work must be scheduled to complete within this timeframe. Any modifications or extensions will be requested through ABC Corp and vendor contracting officers for review and discussion.

# Place of Performance

The selected vendor for the Dashboards project will perform a majority of the work at its own facility. The vendor will be required to meet at ABC’s facility once per week (day and time TBD) for a weekly status meeting. Additionally, all project gate reviews will be held at ABC’s facility and attended by the vendor. ABC will provide and arrange for meeting spaces within its facility for all required vendor meetings. Once the project reaches the training phase, all training will be conducted at ABC’s facility.

# Work Requirements

As part of the Dashboards Project the vendor will be responsible for performing tasks throughout various stages of this project. The following is a list of these tasks which will result in the successful completion of this project:

Kickoff:

* Vendor will create and present detailed project plan including schedule, WBS, testing plan, implementation plan, training plan, and transition plan
* Vendor will present project plan to ABC for review and approval

Design Phase:

* Work with ABC to gather requirements and establish metrics
* Create site design based on collected requirements
* Develop site design proposal for ABC review and approval
* Present written status at weekly meeting

Build Phase:

* Vendor will complete all coding for approved site design
* Vendor will provide ABC with a detailed testing plan
* Vendor will include all content provided by ABC on redesigned web site
* Vendor will resolve any coding and site issues identified in testing
* Vendor will compile a testing report to present to ABC for review/approval
* Present written status at weekly meeting

Implementation Phase:

* Vendor will implement the newly redesigned web site on ABC servers
* Vendor will begin providing 24x7 web site support at this point forward until the end of the period of performance
* Present written status at weekly meeting

Training Phase:

* Vendor will provide training in accordance with approved training plan provided in the kickoff
* Present written status at weekly meeting

Project Handoff/Closure:

* Vendor will provide ABC with all documentation in accordance with the approved project plan
* Vendor will present project closure report to ABC for review and approval
* Vendor will complete the project requirements checklist showing that all project tasks have been completed
* Vendor will conclude 24x7 web support at 11:59pm on the final day of the period of performance
* Present written status at weekly meeting

# Schedule/Milestones

The below list consists of the initial milestones identified for the Dashboards Project:

Data collection July 12th, 2020

Data QA July 19th, 2020

Database Creation July 26th, 2020

Initial Reports Created August 2nd, 2020

Secondary Reports Created August 9th, 2020

Database and Visualization link created August 16th, 2020

Performance Review August 23rd, 2020

Dashboard Created August 30th, 2020

Project Completion Review September 6, 2020

Project Closure/Archives Complete September 13, 2020

# Acceptance Criteria

For the Dashboards Project the acceptance of all deliverables will reside with Dan Roth. Once a project phase is completed and the vendor provides their report/presentation for review and approval, the Dan Roth will either sign off on the approval for the next phase to begin, or reply to the vendor, in writing, advising what tasks must still be accomplished.

Once all project tasks have been completed, the project will enter the handoff/closure stage. During this stage of the project, the vendor will provide their project closure report and project task checklist to Dan Roth. The acceptance of this documentation by Dan Roth will acknowledge acceptance of all project deliverables and that the vendor has met all assigned tasks.

Any discrepancies involving completion of project tasks or disagreement between ABC and the chosen vendor will be referred to both organizations’ contracting offices for review and discussion.

# Other Requirements

All vendor project team members will submit security forms to ABC for clearance and access badges to the facility. All vendor programmers and quality control team members will be granted access to ABC servers and all necessary IT functions. They will also be given temporary ABC accounts which are to be used only for work pertaining to the Dashboards Project. Upon completion of the project these accounts will be closed.

# Introduction

The Scope Management Plan provides the scope framework for this project. This plan documents the scope management approach; roles and responsibilities as they pertain to project scope; scope definition; verification and control measures; scope change control; and the project’s work breakdown structure. Any project communication which pertains to the project’s scope should adhere to the Scope Management Plan.

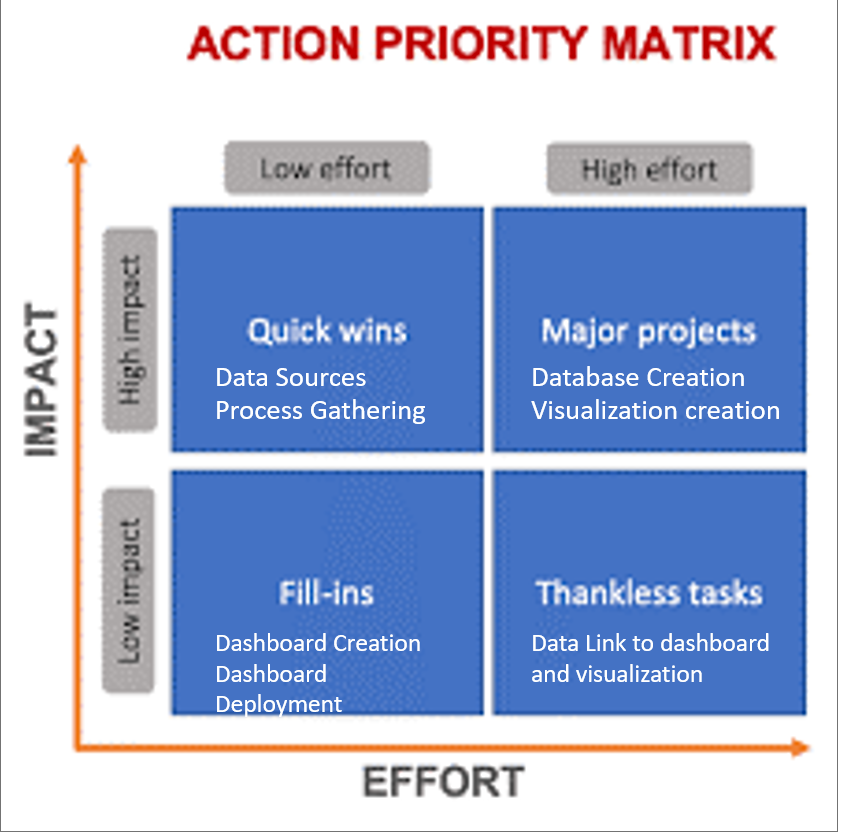
This project will show a dashboard which will include a visualization for national polls between the two candidates, visualizations of polls for all 50 states, and the president’s approval ratings. Variance will be calculated weekly for all of the polls where data is attainable, showing variance from week to week.

# Scope Management Approach

For this project, scope management will be the sole responsibility of the Project Manager. The scope for this project is defined by the Scope Statement, Work Breakdown Structure (WBS) and WBS Dictionary. The Project Manager, Sponsor and Stakeholders will establish and approve documentation for measuring project scope which includes deliverable quality checklists and work performance measurements. Proposed scope changes may be initiated by the Project Manager, Stakeholders or any member of the project team. All change requests will be submitted to the Project Manager who will then evaluate the requested scope change. Upon acceptance of the scope change request the Project Manager will submit the scope change request to the Change Control Board and Project Sponsor for acceptance. Upon approval of scope changes by the Change Control Board and Project Sponsor the Project Manager will update all project documents and communicate the scope change to all stakeholders. Based on feedback and input from the Project Manager and Stakeholders, the Project Sponsor is responsible for the acceptance of the final project deliverables and project scope.

# Roles and Responsibilities

The Project Manager, Sponsor and team will all play key roles in managing the scope of this project. As such, the project sponsor, manager, and team members must be aware of their responsibilities in order to ensure that work performed on the project is within the established scope throughout the entire duration of the project. The table below defines the roles and responsibilities for the scope management of this project.



**Scope Management Plan**

**2020 Election Dashboards**

**Sonny Desai**

**182 Garden gate Lane**

**Irvine, CA 92620**

**07/05/2020**

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# Introduction

The Scope Management Plan provides the scope framework for this project. This plan documents the scope management approach; roles and responsibilities as they pertain to project scope; scope definition; verification and control measures; scope change control; and the project’s work breakdown structure. Any project communication which pertains to the project’s scope should adhere to the Scope Management Plan.

This project is for designing, programming, and testing a new software product which will be used to track the company’s finances and improve various financial processes. This includes design of the software, all programming and coding, and testing/validation of the software. No external resources or outsourcing are anticipated for this project.

# Scope Management Approach

For this project, scope management will be the sole responsibility of the Project Manager. The scope for this project is defined by the Scope Statement, Work Breakdown Structure (WBS) and WBS Dictionary. The Project Manager, Sponsor and Stakeholders will establish and approve documentation for measuring project scope which includes deliverable quality checklists and work performance measurements. Proposed scope changes may be initiated by the Project Manager, Stakeholders or any member of the project team. All change requests will be submitted to the Project Manager who will then evaluate the requested scope change. Upon acceptance of the scope change request the Project Manager will submit the scope change request to the Change Control Board and Project Sponsor for acceptance. Upon approval of scope changes by the Change Control Board and Project Sponsor the Project Manager will update all project documents and communicate the scope change to all stakeholders. Based on feedback and input from the Project Manager and Stakeholders, the Project Sponsor is responsible for the acceptance of the final project deliverables and project scope.

# Roles and Responsibilities

The Project Manager, Sponsor and team will all play key roles in managing the scope of this project. As such, the project sponsor, manager, and team members must be aware of their responsibilities in order to ensure that work performed on the project is within the established scope throughout the entire duration of the project. The table below defines the roles and responsibilities for the scope management of this project.

|  |  |  |
| --- | --- | --- |
| **Name** | **Role** | **Responsibilities** |
| John Doe | Sponsor | * Approve or deny scope change requests as appropriate * Evaluate need for scope change requests * Accept project deliverables |
|  |  |  |
| Sonny Desai | Project Manager | * Measure and verify project scope * Facilitate scope change requests * Facilitate impact assessments of scope change requests * Organize and facilitate scheduled change control meetings * Communicate outcomes of scope change requests * Update project documents upon approval of all scope changes |
| Bob Jones | Team Lead | * Measure and verify project scope * Validate scope change requests * Participate in impact assessments of scope change requests * Communicate outcomes of scope change requests to team * Facilitate team level change review process |
| John Smith | Team Member | * Participate in defining change resolutions * Evaluate the need for scope changes and communicate them to the project manager as necessary |
| Tom Brown | Team Member | * Participate in defining change resolutions * Evaluate the need for scope changes and communicate them to the project manager as necessary |

**Table 1.1, *Scope Management Roles and Responsibilities***

# Scope Definition

The scope for this project was defined through a comprehensive requirements collection process. First, a thorough analysis was performed on the company’s current software applications based on employee and user feedback. From this information, the project team developed the project requirements documentation, the requirements management plan, and the requirements traceability matrix for what the new software application must accomplish.

The project description and deliverables were developed based on the requirements collection process and input from subject matter experts in software design, technical support, programming and business applications. This process of expert judgment provided feedback on the most effective ways to meet the original requirements of providing a new software platform from which the company can improve its financial tracking and internal financial processes.

# Project Scope Statement

The project scope statement provides a detailed description of the project, deliverables, constraints, exclusions, assumptions, and acceptance criteria. Additionally, the scope statement includes what work should not be performed in order to eliminate any implied but unnecessary work which falls outside the of the project’s scope.

The Dashboard Project has been approved to collect relevant and pertinent data, construct a database to hold said data, create report visualizations for polling data for all 50 states, the president’s approval rating, economic indicators, and demographic data. The database will then be linked to the visualizations directly and offer weekly refresh of visualization of the data. The visualizations will be pinned to a select few dashboard based on category type, and the dashboard will be deployed for viewing. The purpose of the project is to help visualize complex and broad data in more simpler and narrower terms, and to provide analysis for which campaigns can then adjust their strategy based upon data outcomes.

# Work Breakdown Structure

In order to effectively manage the work required to complete this project, it will be subdivided into individual work packages which will not exceed 40 hours of work. This will allow the Project Manager to more effectively manage the project’s scope as the project team works on the tasks necessary for project completion. The project is broken down into three phases: the design phase; the programming phase; and the testing phase. Each of these phases is then subdivided further down to work packages which will require no more than 40 hours of work and no less than 4 hours of work (see WBS structure below).

**Figure 1.1, *Work Breakdown Structure (WBS)***

In order to more clearly define the work necessary for project completion the WBS Dictionary is used. The WBS Dictionary includes an entry for each WBS element. The WBS Dictionary includes a detailed description of work for each element and the deliverables, budget and resource needs for that element. The project team will use the WBS Dictionary as a statement of work for each WBS element.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Level | WBS Code | Element Name | Description of Work | Deliverables | Budget | Resources |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

**Table 1.2, *WBS Dictionary***

# Scope Verification

As this project progresses the Project Manager will verify interim project deliverables against the original scope as defined in the scope statement, WBS and WBS Dictionary. Once the Project Manager verifies that the scope meets the requirements defined in the project plan, the Project Manager and Sponsor will meet for formal acceptance of the deliverable. During this meeting the Project Manager will present the deliverable to the Project Sponsor for formal acceptance. The Project Sponsor will accept the deliverable by signing a project deliverable acceptance document. This will ensure that project work remains within the scope of the project on a consistent basis throughout the life of the project.

# Scope Control

The Project Manager and the project team will work together to control of the scope of the project. The project team will leverage the WBS Dictionary by using it as a statement of work for each WBS element. The project team will ensure that they perform only the work described in the WBS dictionary and generate the defined deliverables for each WBS element. The Project Manager will oversee the project team and the progression of the project to ensure that this scope control process if followed.

If a change to the project scope is needed the process for recommending changes to the scope of the project must be carried out. Any project team member or sponsor can request changes to the project scope. All change requests must be submitted to the Project Manager in the form of a project change request document. The Project Manager will then review the suggested change to the scope of the project. The Project Manager will then either deny the change request if it does not apply to the intent of the project or convene a change control meeting between the project team and Sponsor to review the change request further and perform an impact assessment of the change. If the change request receives initial approval by the Project Manager and Sponsor, the Project Manager will then formally submit the change request to the Change Control Board. If the Change Control Board approves the scope change the Project Sponsor will then formally accept the change by signing the project change control document. Upon acceptance of the scope change by the Change Control Board and Project Sponsor the Project Manager will update all project documents and communicate the scope change to all project team members stakeholders.

# Authorization

Approved by the Project Sponsor:

Date:

<Project Sponsor>

<Project Sponsor Title>

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