

Annual Replanning Workshop

Login Procedures

- Login to PC as yourself:
 - Username = username
 - Password = enter your password
- Run the Default Registry (Clarity Open Workbench)
 - K:\InfoTech\Internal Services\PMO\PM\Clarity\Claritydefaults-win7.reg
- Login into Clarity Production
 - clarity.oakgov.com

Annual Replanning Workshop Agenda

- What's New This Year?
- Supervisor Planning Packets
- Review New Project Plan Files
- PMO Handbook – Section 11 Master Planning
- Enhancement Budgets
- Reports and Portlets
- Annual Replanning Time Line
- Opportunity to Work on Plan Files

2017-2018 Master Plan Project Sizing

What's New This Year?

- A few new steps, A few new portlets
- Why the changes?
 - 2013-14 MP underdelivered by 4% overall and 15% for New Dev
 - 2015-16 MP is on track to underdeliver by 4% overall, 10% ND
 - 72% of all projects are Date Renegotiated/finish late
 - Supervisors putting a lot of effort into predicting demand for Roles
 - Resources needed for projects in other Divisions (SEP, RAP, etc)
- Adding detail in projects and Size Estimates will help PMO compile a more accurate Master Plan and help Supervisors better predict demand for their Team
- New portlets to provide Supervisors more insight into demand for their resources

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Reengineered Plan Files

- 2015-16 Plans Reengineered
 - Non-Project
 - Team Management
 - Customer Support
 - System Maintenance
 - Planned Maintenance & Upgrades

Note: Total Usage (ETC + Actuals) through 04/22/16

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Supervisor Planning Packets

- Current Plans
 - Online Packets Prepared
 - Clarity Project – DH1010QC Quarterly Mgmt Review Collaboration
 - Collaboration Folder – Annual Supervisor Planning Packets/2016
- Clarity Open Workbench Views
 - Actuals/Estimates to prep New Plans
 - Tasks, ETC and Actuals through 04/22/16
 - Approximately 7 months through plan year (about 58%)

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Review New Project Plan Files

- 2016-17 Team and Non-Project Plans
 - Populated with tasks from 2015-16 Team and Non-Project plans
 - ETC = Current Year Total Usage (ETC + Actuals) through 04/22/16
 - Importance of Estimating the Annual Work Effort
 - Only remove inactive resources from the project once the ETC = 0
 - Only add Roles for vacant positions approved to fill
 - Exception for Planned Maintenance & Upgrades
 - Be accurate with the Roles you assign
 - Assign Team OBS for Roles

Annual Replanning Workshop Allocations

- *Default Allocation Percent* will be identical to last year's plan. Adjust so that *Allocation Hours* are approximately equal to *Total Usage*.
 - FTE - Total Usage / 1743 hours (249 business days * 7 hours/day) = DA%
 - Contractor - Total Usage / 1992 (249 business days * 8 hours/day) = DA%
- Remove all Resources with 0 ETC.
- *Allocation Segments* can be set for cyclical work.
- Resources from your team will be hard-booked on 7/21/16.

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PMO Handbook

- Section 11 – Master Planning
 - Annual Team and Non-Project Planning
 - Team Plans
 - Loading Pattern – Uniform vs. Fixed
 - Average Trends Across Department
 - Implementation Schedule
- Section 2 – Project Planning
 - Project Time Calculation – Page 2.22 (validate every 2 years; may change)
- Appendix G – Definitions

2017-2018 Master Plan Project Sizing Enhancement Budgets

- 70+ EBs on the 2015-16 Master Plan
- Lots of overhead for both PMs and PMO to maintain
- Lowest priority on the Master Plan
- Hours allocated but never used (2,800+ hours in 13-14)
- EBs will be combined into one project per Leadership Group
 - One Phase for each “project”
 - Individual “project” hours will be determined by Baseline
 - Use the Usage Analysis Task and Activity reports for detail
 - Supervisor will be the Project Manager. Responsible for keeping the overall project in balance with the Allocation
 - Individuals will have PM rights to manage their Phase
 - The process for requesting enhancements and keeping in balance does not change

2017-2018 Master Plan Project Sizing Enhancement Budgets

- Typically all work in EBs is assigned to PG for App Services, IS, and CLEMIS; and to SA, NS, WS, or DBA for Tech
- In reality, that work may be done by a PM, BA, Supervisor, etc
- For each EB, need ETC and Team OBS for each Role
- Need to do this for all Budget projects – Program Budgets, Citizen Engagement Budgets, etc

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Second-Year Team Plans

- Once plans are Baselined PMO will create 2017-18 Team Plans
 - No detailed tasks, no specific resources
 - One task with ETC summed up by Role
 - ETC will be identical to the 16-17 ETC
 - ETC will be adjusted when 16-17 plans are rebaselined in September
 - Next year the tasks in the 17-18 projects will be reengineered as usual
- Why are we doing this?
 - So PMO can use Clarity's Portfolio functionality to better plan the Role demand for the 2017-2018 Master Plan
 - So Supervisors can better plan long-range Role demand for their Teams

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Portlets

- Role Capacity vs Demand
 - Executive Reporting/Portfolio Dashboard/Role Demand
 - Defaults to new Master Plan Dates, all approved IT Projects (Project OBS = IT, Stage Identifier = Analyze)
 - Filter on Resource OBS to see your own team
 - Shows all work assigned to both actual Resources and generic Roles
 - Compare ETC (Demand) to Availability (Capacity)
 - Availability is calculated as-of today's date. Includes all actual Resources in-house. Does not include Resources to-be-hired.
 - Includes hours assigned to Scope and Contingency
 - Includes hours assigned to EBs and other budgets
 - Hours in the Roles without Team OBS portlet are not included

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Portlets

- Role Demand - PMO
 - Shows Actuals but not Availability
 - Also relies on the Team OBS being populated
- Role Demand by Project
 - Shows each individual project with ETC broken out by Role
 - Does not look at the Team supplying the Role
- Delivery by Leadership Group
 - Defaults to current Master Plan dates
 - Only shows Actuals (history)
 - By Leadership Group. Other portlets are by IT Team

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Portlets

- Capacity Overview
 - Resource Management/Capacity Overview
 - OOB portlet – can configure but can't customize
 - Pros: drill-down by Resource OBS, lots of filters, timescale, icons link to detailed portlets
 - Cons: can't see total hours (only timescale)
 - By default the portlet includes both Resources and Roles. If you filter on Primary Role (for example, = BA) hours include only Resources. If you filter on Resource = Business Analyst hours include only Roles. You can't filter on both at the same time!
- Don't forget about the Workloads portlet as an alternative to Resource Utilization reports!

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Annual Replanning Time Line

- April 29 Packets Distributed
- June 16 Plans Completed
- July 12 Management Review
- July 19 Final Changes to Plans
- July 21 Plans Baselined
- September 29 Plans Re-Baselined
- October 4 Time Tracking Begins

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2017-2018 Master Plan Dates

- October 1, 2016 – September 30, 2018
 - Q1: 10/1/16 – 12/31/16
 - Q2: 1/1/17 – 3/31/17, etc.
- Variance Explanations due 1/10/17 instead of 1/3/17
- Aligns with calendar and fiscal quarters
- Utilize Monthly and Quarterly Time Scale capability in Clarity
- No longer overlaps Billing deadlines
- No longer overlaps County holidays and peak vacation times

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Questions

Time Tracking for this Workshop

- FTE – Training Task
- Contractors – Tracking & Control in Team Mgt Plan

Additional Questions

Time allowed to work on your plan files

