NETS project management proposal
Jeff Custard and Fabian Guerrero – 01-Apr-2011

This is a proposal for updated methods for tracking of projects within NETS.

Introduction

We wanted to start with an emphasis on fitting in to present methods or ways that NETS already handles many others tasks and processes today. As part of our research, we’ve noted that these happen to line up with many 'Agile' practices and philosophies we keep running across anyway. We think this is an area that seems to be successfully getting traction in many other areas as a good way to proceed and get things done. We tend to like these kinds of methods because that’s how NETS functions anyway, so if we use agile terms, we typically chose them because we thought they already fit with many ways NETS already does business.

Staff time tracking

For staff time tracking, we propose high-level spreadsheet tracking (or wiki calendar integration options) for staff based on calendar update processes currently in place. We are open to methods that can be worked out here, but besides using Microsoft Project (or purchasing commercial software options with similar functionality), we have not found another set of satisfactory tools for this area.

We were hoping that as part of availability of staff resources we could simply do an initial split based on group (e.g., NE or NI). After determining which group should handle a given task, we’d then break it down by who has cycles in that group depending on the task(s) to be done with that project. This would not be detailed staff tracking time by hour as might be done in another resource tracking tool (such as MS Project) but should allow at least an at-a-week glance to see if we have sufficient staff resources based on any overlapping timing issues we identify across projects.

We think that the benefits of other methods we outline below will outweigh separate software tracking (or reliance on MS Project) so we’d like to proceed per below.

Project methods and minimums

The high level overview of what we propose for NETS project tracking starting in April 2011 is outlined below.

Each project will note which basic phase it is currently in (along with 'monitoring and control' elements as needed for each of these):

1. Initiation (e.g., might include setting up the wiki, identifying impacted resources, etc.).
2. Planning (e.g., working on project documents, time line modifications and so on).
3. Implementation (project is active and being tracked by items in project wiki space).
4. Closeout (project wrap up, which may include moving documentation or other finalization tasks).

We can keep as informal or ad-hoc as needed but we wanted to provide a basic outline structure for project minimums (based on templates to be provided) outside of the constraints of a dedicated software package (like MS Project).

Our proposal framework suggests a wiki based structure for tracking projects and related documentation as shown in this diagram:
Each project (depending on scope and fit) could have a wiki page with the following formats that we can modify as needed over time:

1. project page (lowest level; including status indicators and estimates toward completion).
2. project grouping page (optional/if applicable).
3. project dashboard (which will show, in one location, overall project list and status).

For project status indicators, we propose an estimate of percent complete as well as including these simple colors:

1. Red (project held up; some problem or issue).
2. Yellow (potential risk or delay).
3. Green (on track/OK).
4. Blue (indicating project on hold but should remain in the wiki project tracking area because it is likely to come back active again).

Those could be modified as needed so they are most useful for various groups within an agreed upon framework as long as all the minimum high-level template project information feeds up into grouping and dashboard pages.

Additionally, project managers may choose to incorporate one or more spreadsheet formats (again, in lieu of Microsoft Project) that we have been testing. We can go over examples to ensure we include elements that team members and management need to have incorporated as well as meet minimum export formats for sending to other groups.

For scrums or updates, depending on project scope, each project lead could choose to utilize other template formats indicating a minimum amount that needs to be communicated (e.g., email updates, or high level reviews at NETS meetings).
We have a sandbox area within

https://wiki.ucar.edu/x/OJBCB

that illustrates some examples we’ve been experimenting with to determine how various elements of our proposal could potentially be implemented.

We have reviewed this at a high level with the NETS manager (28-Mar-2011), and discussed it briefly at an NE wiki review meeting (29-Mar-2011). We now want to present the proposal to all of NETS (Friday 01-Apr-2011) to ensure this proposed framework will work for project leads, team members, and managerial aspects that need to be considered.