# OAKS Resource Management Plan

**Prepared**

**for**

**The State of Ohio**

**OAKS Project**

**Prepared By**

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"Document
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# 1 Introduction

## 1.1 Objectives

The objective of the Resource Management process is to ensure that the appropriate personnel are made available to the project teams at the appropriate times. This involves forecasting the needs, staffing/assigning full-time and part-time personnel, and managing changes to resource needs.

Resource Management will provide the following benefits:

- Provide a simple but flexible staffing process to ensure that appropriately skilled resources are available in a timely manner
- Ensure the right role is assigned to the right person
- Ensure that evaluations of team members are arranged and their contributions are acknowledged
- Provide a feedback mechanism for input into performance evaluations

## 1.2 Scope

This document describes the processes and tools that the OAKS Project will undertake to manage resources.

The Release Managers and PMO Manager will manage this process and ensure that the projects are staffed as needed, and that the requesting teams are kept apprised of their requests. Use of resources will be tracked for purposes of budget and financial tracking.

# 2 Roles and Responsibilities

## 2.1 Deputy Project Manager

- Identify full-time resource needs based on Resource Requests
- Participate in review sessions with project managers
- Follow-up on outstanding resource requests
- Update Resource Staffing Plan
- Provide orientation materials, as needed
- Identify full-time resource needs based on Resource Requests

## 2.2 Project Team Leads

- Review and monitor resource needs; identify changes and provide updates to PMO Manager
- Provide forecasted resource needs to PMO
- Manage resources within release
- Review resource requests with PMO Manager (review/approve requests)
- Provide performance feedback for resources

## 2.3 Change Management Team

- Assist project team leads with in/out-processing of new resources
- Conduct new joiner project orientation
- Maintain roll-on and roll-off checklists

# 3 Process Overview

### 3.1.1 High Level Process Flow

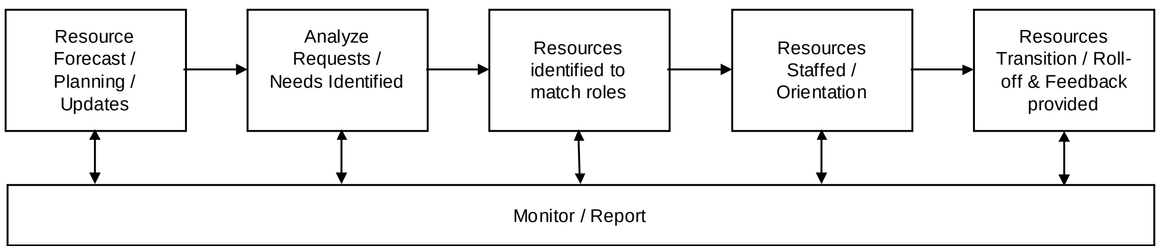


**Figure 1 - Resource Management Process Flow**

### 3.1.2 Resource Forecast/Planning/Updates

Project resource needs will be captured and incorporated into the Resource Staffing Plan spreadsheet by the Accenture deputy project manager. The deputy project manager will own the spreadsheet. The spreadsheet includes number of resources, target release(s)/team(s), and planned workdays. The deputy project manager will send out the staffing plan to the project team leads two days after the end of each pay period to request changes/updates.

### 3.1.3 Analyze Requests/Needs Identified

The project team leads and deputy project manager will analyze the resource forecast and place a resource request. The deputy project manager will track all current resources staffing requests in the Resource Staffing Requests spreadsheet. It contains role descriptions, required skills, resource level, target start date, Project contact person, etc. Changes/updates to this spreadsheet will be made by the project team leads and the deputy project manager.

### 3.1.4 Resources Identified to Match Roles

If resource assignment conflicts occur, priority will be given to the critical path activities first, in support of maintaining the Work Breakdown Structure (project schedule). The project team leads will resolve these conflicts. The impacted team lead(s) will be notified of any necessary shifts in resources.

### 3.1.5 Resources Staffed/Orientation

Once confirmed, the project team lead should contact the resource with logistics and coordinate the exact start date. The change management team has been assigned the task of in-processing new team members to OAKS and will request a LAN ID, workspace, etc. for the new resource. The change management team will also send out common logistical information and a general orientation package to all new resources. The team leads are responsible for providing any project specific information. (The roll-on checklist that the change management team uses to setup new resources can be found on the shared "I" drive at: *I/Change Management/Projects and Activities/PMO Staff Orientation/IT Request Forms*)

The project team lead or someone from the change management team (or designated team member) is responsible for orienting the resource to the project, introducing the resource to other team members, providing the resource with team-specific procedures and standards, and ensuring the resource is appropriately trained. In addition, the project team lead will be responsible for expectation management between the project and the individual resource. The project team lead will document the resource's roles and expectations in the Global Assessment Tool (GAT) and review them with the resource within his/her first week on the project.

### 3.1.6 Resource Transition/Roll-off

The project team leads and deputy project manager will control the project roll-off dates and together with the team leads will ensure that transition is effectively managed. It is anticipated that resources will move between projects, leave the project while it is in progress, and/or join the project in progress. Project team leads are responsible for ensuring resource transitions are completed.

The project team lead, coordinating with the change management team will send out requests to discontinue LAN access, corporate housing, etc. The roll-off checklist that the Project Office uses can be found on the shared "I" drive at: *I/Change Management/Projects and Activities Folder/PMO Staff Orientation/Miscellaneous/Off Boarding*.

### 3.1.7 Performance Feedback

The individuals responsible for writing and reviewing Performance Feedback Forms are listed in the Performance Appraisal Tracker spreadsheet. <location, To Be Determined>

A Performance Feedback Form is required:

1. When an individual's role on a project changes
2. At the end of a project
3. At the end of the performance year (31 September)

In addition, a Project Feedback Form could be completed in the following situations:

1. On Request: An individual can request the completion of a Project Feedback Form during the course of a project or performance year (e.g. individual works on the same project for one year and requests a Project Feedback Form after six months).

2. Short Duration Projects: If an individual has worked on a project for less than 4 weeks, his/her contribution should be documented. The project supervisor needs to complete only the Contribution section of the Project Feedback Form in this instance.

3. Significant Involvement in Activities Outside of Normal Responsibilities: If an individual has made contributions outside the normal scope of his or her role (e.g. significant involvement in their Community), then the lead of that effort can document the individual's contribution. Again, only the Contribution section of the Project Feedback Form needs to be completed in this instance.

### 3.1.8 Monitor/Report

The deputy project manager will collect and process the new resource requests and monitor the status of outstanding requests on an on-going basis. In addition, the Project's resource status will be integrated in the performance reporting cycle(s). Resource actuals will be reported as part of the Project budget and captured in weekly T-doc reports.