

# Project Management

## **SUCCESSION PLANNING**

### Ohio's Talent for Tomorrow and Beyond

***The right person, in the right place, in the right position, at the right time.***



DEPARTMENT OF ADMINISTRATIVE SERVICES (DAS)  
LEARNING AND DEVELOPMENT  
PROJECT MANAGEMENT PROGRAM

**May 2011**

*Debora Branham, Doug Chaney,  
LeOndra Cummings, Niranjan Kumar, Sherri Lowe*

# Ohio

# PROJECT CHARTER

PROJECT IDENTIFICATION		
Project Name	Project Sponsor	Agency Name
Ohio's Talent for Tomorrow and Beyond	Department of Administration (DAS)	<ul style="list-style-type: none"><li>Department of Commerce</li><li>Department of Education</li><li>Department of Health</li><li>Department of Job &amp; Family Services</li></ul>
Project Number	Project Team Members	Date Created
2011-TT-001	Branham, Chaney, Cummings, Kumar, Lowe	April 12, 2011

PROJECT DESCRIPTION
<b>Project Background and Purpose</b> <p>The State of Ohio is facing unprecedented fiscal shortfalls, and as a result of these phenomena, agency leadership is being challenged in the deployment and development of its employee base for business continuity. This project will support agency leadership through this endeavor by developing a succession planning framework that will identify key positions in their office and ensure that <i>the right person is in the right place, in the right position at the right time.</i></p>
<b>Business Case</b> <p>The need for a comprehensive succession process to identify and mobilize Ohio's resources is more apparent and necessary today due to a pending exodus of 6,989 employees statewide, or approximately 16% of the state's total workforce. With the potential loss of key knowledge and skills an improved way to prepare individuals for future roles and responsibilities is apparent. Succession Planning is a process that will support offices in identifying key positions, the current and future knowledge, skills, and abilities individuals need to be successful in that position, and assessment of current office talent to fulfill those roles to ensure business continuity. At the end of this process each office will have a comprehensive pool of talent to draw upon to meet current and future office needs.</p>
<b>Product/Service Description</b>
<b>Project Objectives:</b> <ol style="list-style-type: none"><li>1. Creation of a succession planning framework, processes and tools</li><li>2. Capture pertinent institutional knowledge and skills for key positions</li><li>3. Identify key linkages to other supporting agency processes and systems</li><li>4. Establish a process to measure the success rate of succession planning selections</li></ol>

## Project Timeline/Milestones

Project Pre-Planning	4/5/2011
Develop Human Resource Plan Develop Communication Plan Develop Risk Assessment	4/12/2011
Project Budget Project Change Management Plan / Project Quality Plan	4/19/2011
Define Succession Planning Process and Tools <ul style="list-style-type: none"> <li>▪ Process to identify key positions</li> <li>▪ Process to evaluate/assess potential talent</li> <li>▪ Process to develop/maintain talent pool</li> </ul>	4/26/2011
Define Succession Planning Process and Tools: <ul style="list-style-type: none"> <li>▪ Define a knowledge identification and transfer process</li> <li>▪ Define a process to evaluate and measure success of the process</li> <li>▪ Draft presentation template</li> </ul>	5/3/2011
Develop Presentation and Supports	5/10/2011
Deliver Presentation	5/17/2011

## PROJECT MANAGER AND AUTHORITY LEVEL

### **Project Background and Purpose**

The Project Managers, Debora Branham and Doug Chaney, are hereby authorized to interface with management as required, negotiate for resources, delegate responsibilities within the framework of the project, and to communicate with all contractors and management, as required, to ensure successful and timely completion of the project. The Project Managers are responsible for developing the project plan, monitoring the schedule, cost, and scope of the project during implementation, and maintaining control over the project by measuring performance and taking corrective action.

## PROJECT BUDGET

The budget for the Ohio Talent: Tomorrow and Beyond is \$19,313. It is to be funded through individual respective departments.

## APPROVAL

Name	Title	Date	Approved
Nelson Gonzalez	Training Program Manager	04/12/2011	

# SCOPE STATEMENT

<b>PROJECT IDENTIFICATION</b>		
Project Name	Project Sponsor	Name of Agencies
Ohio's Talent Tomorrow and Beyond	Department of Administrative Services (DAS)	<ul style="list-style-type: none"> <li>▪ Department of Commerce</li> <li>▪ Department of Education</li> <li>▪ Department of Health</li> <li>▪ Department of Job &amp; Family Services</li> </ul>
Project Number	Project Team Members	Date Revised
2011-OTTB-001	Branham, Chaney, Cummings, Kumar, Lowe	May 4, 2011

**PROJECT/PRODUCT OBJECTIVES**

The project objective is to provide a recommended framework for succession planning to identify, assess and develop the required talent needed for future leadership and key positions. Conditions of satisfaction include:

1. Project completed in six weeks.
2. Project will offer a manager's toolkit for the identified deliverables in six weeks.
3. Project will offer a strategy to support agency workforce planning and leadership development.

**PROJECT DESCRIPTION / DELIVERABLES – IN SCOPE**

To support agency leadership in their human capital and succession planning needs, this project includes the following deliverables:

1. Develop succession planning framework that defines key aspects, outcomes and processes.
2. Develop supporting tools, processes and templates for a succession planning framework.
3. Identify links to DAS/agency/other learning and development opportunities for key positions.
4. Identify key linkages to other supporting agency HR processes and systems.
5. Create a manager's toolkit.
6. Develop PM Class team PowerPoint presentation.

**PROJECT FEATURES AND FUNCTIONS**

The following are specific project features that are applicable to the deliverables:

1. Each of the processes may be customized, adapted or modified based the agency's business needs.
2. Each process shall be clearly documented in the manager's toolkit with instruction and visuals.
3. The manager's toolkit including documented processes shall be posted on the DAS website and made available to all agencies.

## OUT OF SCOPE - OBJECTIVES

The following deliverables while necessary supports the succession planning process are out of scope for this project:

1. While the need for a statewide competency management will greatly clarify necessary skills and abilities for future success, identifying competencies is out of scope for this project
2. The need to develop identified successors is paramount, but the development of leadership curricula, opportunities and supporting infrastructure is out of scope for this project.
3. A supporting component of a succession planning process is the utilization of assessment and evaluation tools to identify key talent. The development of such tools is out of scope for this project.
4. Software and supporting technical infrastructure would greatly enhance and support a succession system, but is out of scope for this project.

## INITIAL PROJECT ORGANIZATION

The following is a list of the resources that has defined the project.

Debora Branham	ODH/SME/Team Lead
Doug Chaney	OJFS/SME/Co-Team Lead
LeOndra Cummings	Commerce/Team Member
Niranjan Kumar	ODH/Team Member
Sherri Lowe	Education/Team Member
Nelson Gonzales	DAS/PMI Sponsor

## STAKEHOLDER(S)

The following is a list of key stakeholders:

- Health Transformation Office
- Department of Administration (DAS)
- Agency Leadership
- Agency Managers/Supervisors/Employees
- Unions (1199 & OCSEA)
- Human Resources Departments
- Labor Relations
- Subject Matter Experts (SMEs) from agencies
- Project Team Members

## WORK BREAKDOWN STRUCTURE / SCHEDULE

The work breakdown structure and initial schedule are included on the following page.

## RISK REGISTRY/LOG

Several risks have been defined that may potentially impact the project, see attached Risk Registry/Log.

## BUDGET

The following represents an estimated project cost based on allocated hours by team members:

Labor Resources: Estimated Budget	
<ul style="list-style-type: none"> <li>• Labor – 360 Hours x \$53/hr (including 33% fringe and benefits)</li> <li>• Printing &amp; Binding for 30 Reports and PPT: \$233</li> </ul>	<b>= \$19,313</b>

## ASSUMPTIONS / CONSTRAINTS

The following is a list of known assumptions and constraints that have a potential impact to the project.

Assumptions	Constraints
<ul style="list-style-type: none"> <li>▪ All team members will contribute equally in completing project.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Time and effort in completing project due to competing priorities.</li> </ul>
<ul style="list-style-type: none"> <li>▪ All team members will become knowledgeable about SP to complete work assignments.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Limited knowledge and experience in SP may slow team members down.</li> </ul>
<ul style="list-style-type: none"> <li>▪ Benchmark data is sufficient enough for designing a SP framework and processes for Ohio.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Not sufficient enough time for team members to thoroughly learn about SP in state government.</li> </ul>
<ul style="list-style-type: none"> <li>▪ Two team members are HR SME's, with experience similar to this type of project.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The labor resources for the project need to be balanced and not lean too heavily on the SME's for information.</li> </ul>

## ACCEPTANCE CRITERIA

To ensure the quality of the products developed under the Ohio's Talent: Tomorrow and Beyond, the following product acceptance criteria has been established:

1. Project completed in six weeks.
2. Completion of the project will result in a toolkit and documented high level processes for each of the deliverables.
3. Project will offer a strategy to support agency workforce planning and leadership development.

## COMMUNICATION PLAN

The Communication Plan identifies the regular reporting and communications expected of the project team, such as weekly status updates, reviews, agenda items, sponsor updates, and as-need communication. (See the attached Project Communication Plan).

## QUALITY ASSURANCE AND CONTROL

As part of quality planning, the team identified project processes, product functionality, design criteria, project deliverables, project management performance, documentation, etc. to ensure that the highest quality of work is carried out for the project. Also, user acceptance criteria for product deliverable and product(s) have been defined within the Scope Statement.

To monitor and control the work to be conducted and assure quality throughout the project's life, a quality assurance checkpoint was included into the project work schedule that shall be reviewed by all team members before tasks can be considered as completed and the quality assurance checked off.

The two quality metrics that will be used to measure and provide confidence that project quality is being met and achieved are: 1) all team members will review, proof final products to ensure adherence to project quality standards and acceptance criteria; and 2) the sponsor sign-off and approves final products. Also, the team identified the following success factors as another measure of quality assurance:

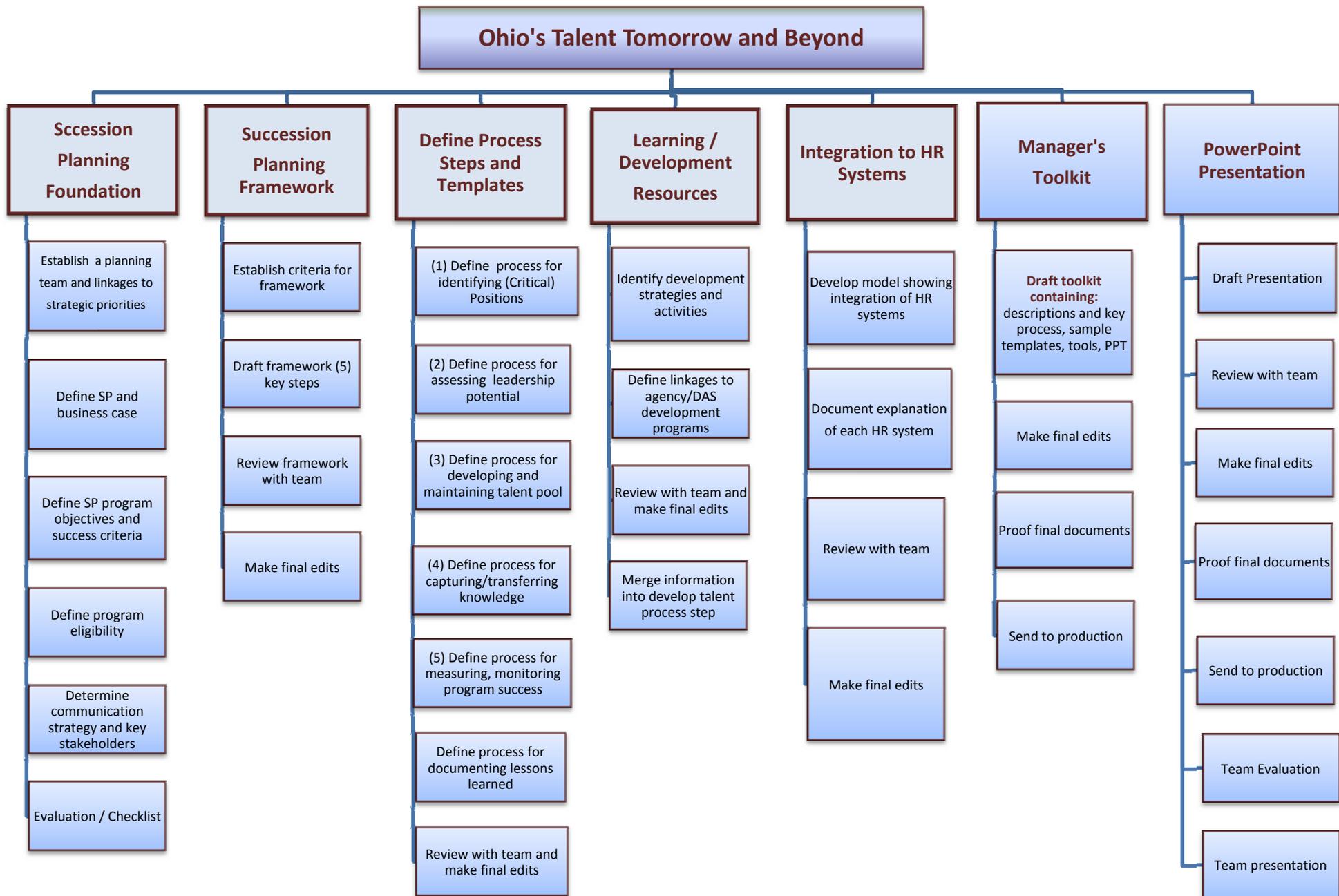
- All team members were dedicated to working together to ensure quality work products and necessary changes.
- Receiving and applying feedback from project sponsor regarding work products.
- Ensuring the team acted quickly to brainstorm the problem and put a corrected process in place as soon as a problem with a process was discovered.

Project evaluation is another part of the total quality process of a project. Therefore, team members will participate in an anonymous team assessment to evaluate individual contributions (See attached form).

## APPROVAL

Name / Title	Signature	Approved Y/N	Date Approved
Nelson Gonzales, DAS PMP Manager			
Debora Branham, Team Lead			
Doug Chaney, Team Lead			
LeOndra Cummings			
Niranjan Kumar			
Sherri Lowe			

# Project Work Breakdown Structure



Ohio's Talent: Tomorrow and Beyond

ID	Task Name	Duration	Start	Finish	Predecessor	% Complete	Quality Assurance	Resource Names		
									S	M
1	<b>Ohio's Talent: Tomorrow and Beyond</b>	<b>33.06 days?</b>	<b>Tue 04/05/11</b>	<b>Fri 05/20/11</b>		<b>100%</b>				
2	<b>Project Initiation</b>	<b>2 days</b>	<b>Tue 04/05/11</b>	<b>Wed 04/06/11</b>		<b>100%</b>				
3	Project Charter / Scope	2 days	Tue 04/05/11	Wed 04/06/11		100%	Yes	Debora [30%]  Doug[30%]  LeOndra[30%]  Niranjan[30%]		
4	WBS / Schedule	1 day	Tue 04/05/11	Tue 04/05/11	3	100%	Yes	Debora [30%]  Doug[30%]  LeOndra[30%]  Niranjan[30%]		
5	Communication Plan / Risk Registry	1 day	Tue 04/05/11	Tue 04/05/11	4	100%	Yes	Debora [30%]  Doug[30%]  LeOndra[30%]  Niranjan[30%]		
6	Human Resource Plan	1 day	Tue 04/05/11	Tue 04/05/11	5	100%	Yes	Debora [30%]  Doug[30%]  LeOndra[30%]  Niranjan[30%]		
7	Change Control / Quality	1 day	Tue 04/05/11	Wed 04/06/11	6	100%	Yes	Debora [30%]  Doug[30%]  LeOndra[30%]  Niranjan[30%]		
8	Milestone 1	0 days	Wed 04/06/11	Wed 04/06/11	7	100%	Yes	Debora [30%]  Doug[30%]  LeOndra[30%]  Niranjan[30%]		
9	<b>Scession Planning Foundation</b>	<b>5 days</b>	<b>Wed 04/06/11</b>	<b>Wed 04/13/11</b>		<b>100%</b>				
10	Establish a planning team and linkages to strategic priorities	1 day	Wed 04/06/11	Thu 04/07/11	8	100%	Yes	Debora [30%]  Doug[30%]		
11	Define SP and business case	1 day	Thu 04/07/11	Fri 04/08/11	10	100%	Yes	Debora [30%]  Doug[30%]		
12	Define SP program objectives and success criteria	1 day	Fri 04/08/11	Mon 04/11/11	11	100%	Yes	Debora [30%]  Doug[30%]		
13	Define program eligibility	1 day	Mon 04/11/11	Tue 04/12/11	12	100%		Debora [30%]  Doug[30%]		
14	Determine communication strategy and key stakeholders	1 day	Tue 04/12/11	Wed 04/13/11	13	100%	Yes	Debora [30%]  Doug[30%]		
15	<b>Succession Planning Framework</b>	<b>4 days?</b>	<b>Thu 04/14/11</b>	<b>Wed 04/20/11</b>		<b>100%</b>				
16	Establish criteria for framework	1 day?	Thu 04/14/11	Fri 04/15/11	14	100%	Yes	Debora [30%]  Doug[30%]		
17	Draft framework (5) key steps	1 day	Fri 04/15/11	Mon 04/18/11	16	100%	Yes	Debora [30%]  Doug[30%]		
18	Review framework with team	1 day	Mon 04/18/11	Tue 04/19/11	17	100%	Yes	Debora [30%]  Doug[30%]		
19	Make final edits	1 day	Tue 04/19/11	Wed 04/20/11	18	100%	Yes	Debora [30%]  Doug[30%]  LeOndra[30%]  Niranjan[30%]		
20	Milestone 2	0 days	Wed 04/20/11	Wed 04/20/11	19	100%	Yes	Debora [30%]  Doug[30%]  LeOndra[30%]  Niranjan[30%]		
21	<b>Define Process Steps and Templates</b>	<b>7 days</b>	<b>Wed 04/20/11</b>	<b>Fri 04/29/11</b>		<b>100%</b>				
22	(1) Define process for identifying (Critical) Positions	1 day	Wed 04/20/11	Thu 04/21/11	20	100%	Yes	LeOndra[30%]		
23	(2) Define process for assessing leadership potential	1 day	Thu 04/21/11	Fri 04/22/11	22	100%	Yes	LeOndra[30%]		
24	(3) Define process for developing and retaining talent pool	1 day	Fri 04/22/11	Mon 04/25/11	23	100%	Yes	Niranjan[30%]		
25	(4) Define process for capturing/transferring knowledge	1 day	Mon 04/25/11	Tue 04/26/11	24	100%	Yes	Sherri[30%]		
26	(5) Define process for measuring, monitoring program success	1 day	Tue 04/26/11	Wed 04/27/11	25	100%	Yes	Debora [30%]		

Project: PM\_Schedule\_OTTBProject  
Date: Wed 09/28/11

Task		External Milestone		Manual Summary Rollup	
Split		Inactive Task		Manual Summary	
Milestone		Inactive Milestone		Start-only	
Summary		Inactive Summary		Finish-only	
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Ohio's Talent: Tomorrow and Beyond

ID	Task Name	Duration	Start	Finish	Predecessor	% Complete	Quality Assurance	Resource Names		
									S	M
27	Define process for documenting lessons learned	1 day	Wed 04/27/11	Thu 04/28/11	26	100%	Yes	Debora [30%] Doug[30%]		
28	Review with team and make final edits	1 day	Thu 04/28/11	Fri 04/29/11	27	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%] She		
29	<b>Learning / Development Plans</b>	<b>2.25 days</b>	<b>Fri 04/29/11</b>	<b>Wed 05/04/11</b>		<b>100%</b>				
30	Identify development strategies and activities	1 day	Fri 04/29/11	Mon 05/02/11	28	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%] She		
31	Define linkages to agency/DAS development programs	4 hrs	Mon 05/02/11	Tue 05/03/11	30	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%] She		
32	Review with team and make final edits	4 hrs	Tue 05/03/11	Tue 05/03/11	31	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%] She		
33	Merge information into develop talent process step	2 hrs	Tue 05/03/11	Wed 05/04/11	32	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%] She		
34	<b>Integration and linkage to HR Systems</b>	<b>3.5 days</b>	<b>Thu 05/05/11</b>	<b>Wed 05/11/11</b>		<b>100%</b>				
35	Develop model showing integration of HR systems	4 hrs	Thu 05/05/11	Fri 05/06/11	33	100%	Yes	Debora [30%] Doug[30%]		
36	Document explanation of each HR system	4 hrs	Fri 05/06/11	Mon 05/09/11	35	100%	Yes	Debora [30%]		
37	Review with team	4 hrs	Mon 05/09/11	Tue 05/10/11	36	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%]		
38	Make final edits	4 hrs	Tue 05/10/11	Wed 05/11/11	37	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%]		
39	Milestone 3	0 days	Wed 05/11/11	Wed 05/11/11	38	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%]		
40	<b>Manager's Toolkit</b>	<b>6.26 days</b>	<b>Wed 05/11/11</b>	<b>Fri 05/20/11</b>		<b>100%</b>				
41	Draft toolkit containing: descriptions and key process, sample templates, tools and power points.	1 day	Wed 05/11/11	Thu 05/12/11	39	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%] She		
42	Review with team	1 day	Fri 05/13/11	Mon 05/16/11	41	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%]		
43	Proof final documents	1 day	Wed 05/18/11	Thu 05/19/11	42	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%]		
44	Make final edits	4 hrs	Wed 05/18/11	Thu 05/19/11	43	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%]		
45	Send to production	2 hrs	Thu 05/19/11	Thu 05/19/11	44	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%]		
46	Team evaluation	4 hrs	Thu 05/19/11	Fri 05/20/11	45	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%]		
47	<b>Class PowerPoint Presentation</b>	<b>4.24 days</b>	<b>Thu 05/12/11</b>	<b>Wed 05/18/11</b>		<b>100%</b>				
48	Draft PowerPoint Presentation	1 day	Thu 05/12/11	Fri 05/13/11	37	100%	Yes	Sherri[30%]		
49	Review with team	1 day	Thu 05/12/11	Fri 05/13/11	48	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%]		
50	Proof final documents	1 day	Fri 05/13/11	Mon 05/16/11	49	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%]		
51	Make final edits	1 day	Mon 05/16/11	Tue 05/17/11	50	100%	Yes	Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%]		

Project: PM_Schedule_OTTBProject Date: Wed 09/28/11	Task		External Milestone		Manual Summary Rollup	
	Split		Inactive Task		Manual Summary	
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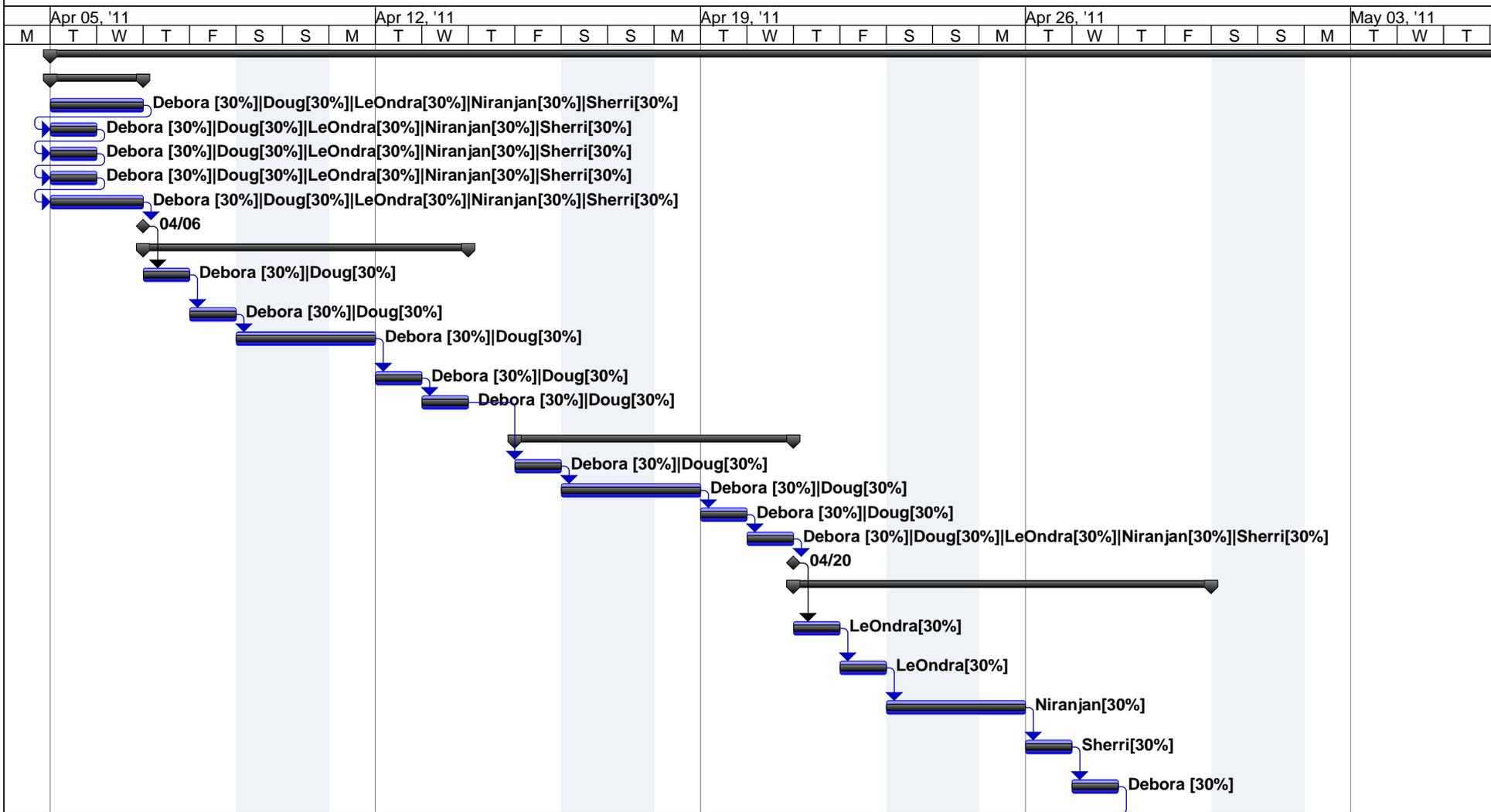
### Ohio's Talent: Tomorrow and Beyond

ID		Task Name	Duration	Start	Finish	Predecessor	% Complete	Quality Assurance	Resource Names		
										S	M
52	<input checked="" type="checkbox"/>	Send to production	2 hrs	Tue 05/17/11	Wed 05/18/11	51	100%	Yes	LeOndra[30%]		
53	<input checked="" type="checkbox"/>	Team evaluation	4 hrs	Tue 05/17/11	Wed 05/18/11	51	100%	Yes	Debora [30%]  Doug[30%]  LeOndra[30%]  Niranjan[30%]		

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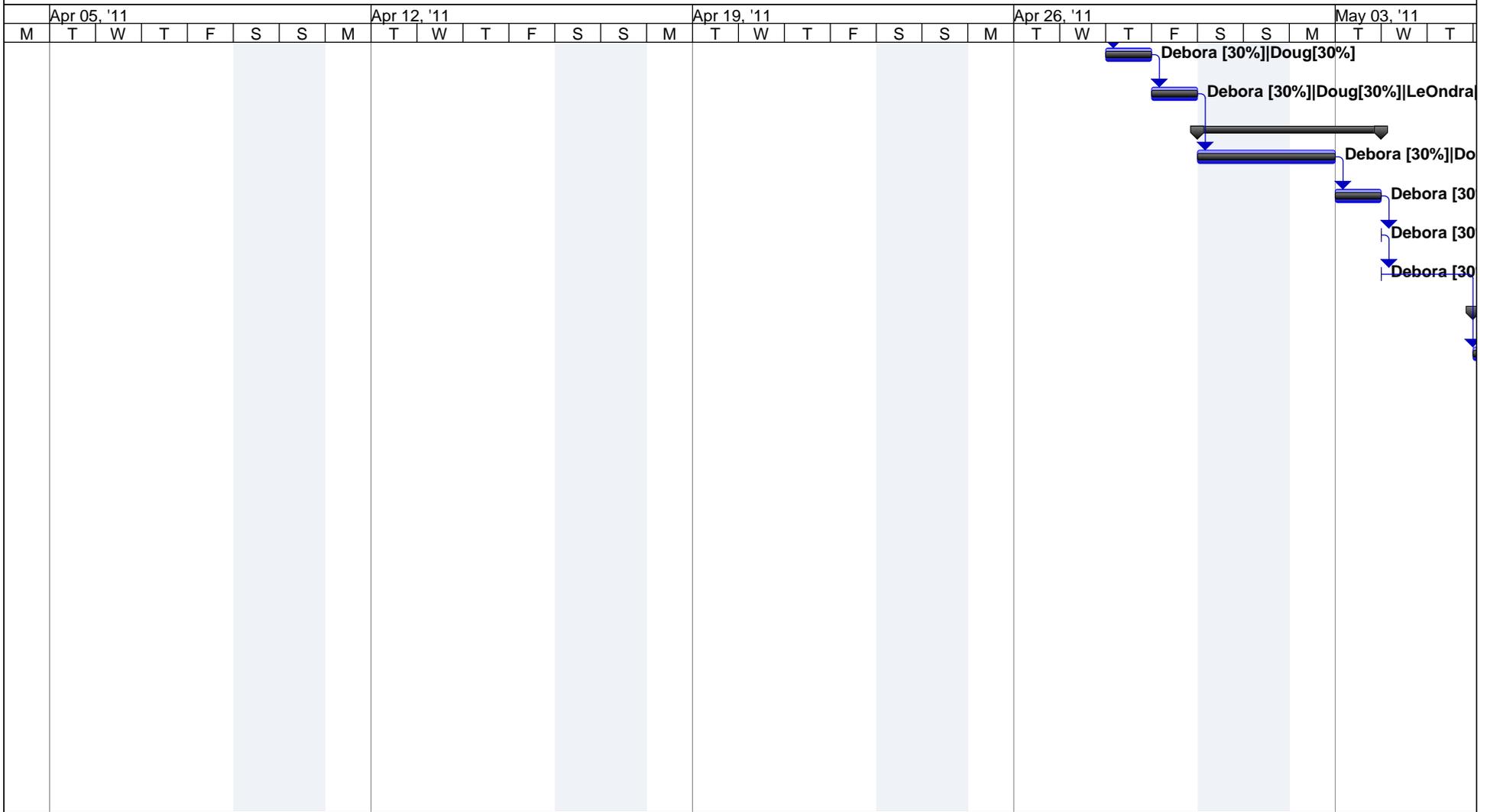
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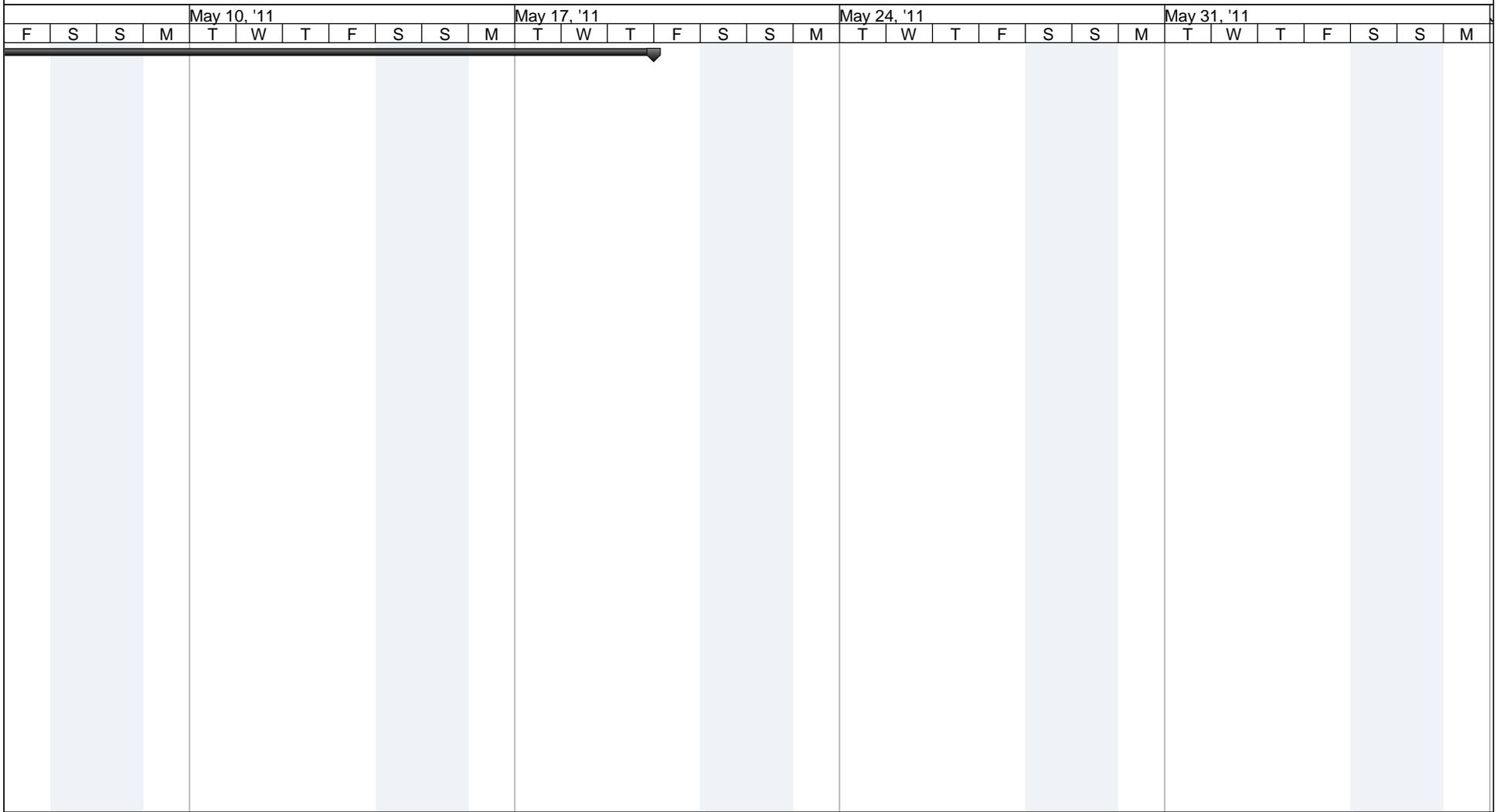
# Ohio's Talent: Tomorrow and Beyond

Apr 05, '11							Apr 12, '11							Apr 19, '11							Apr 26, '11							May 03, '11			
M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T



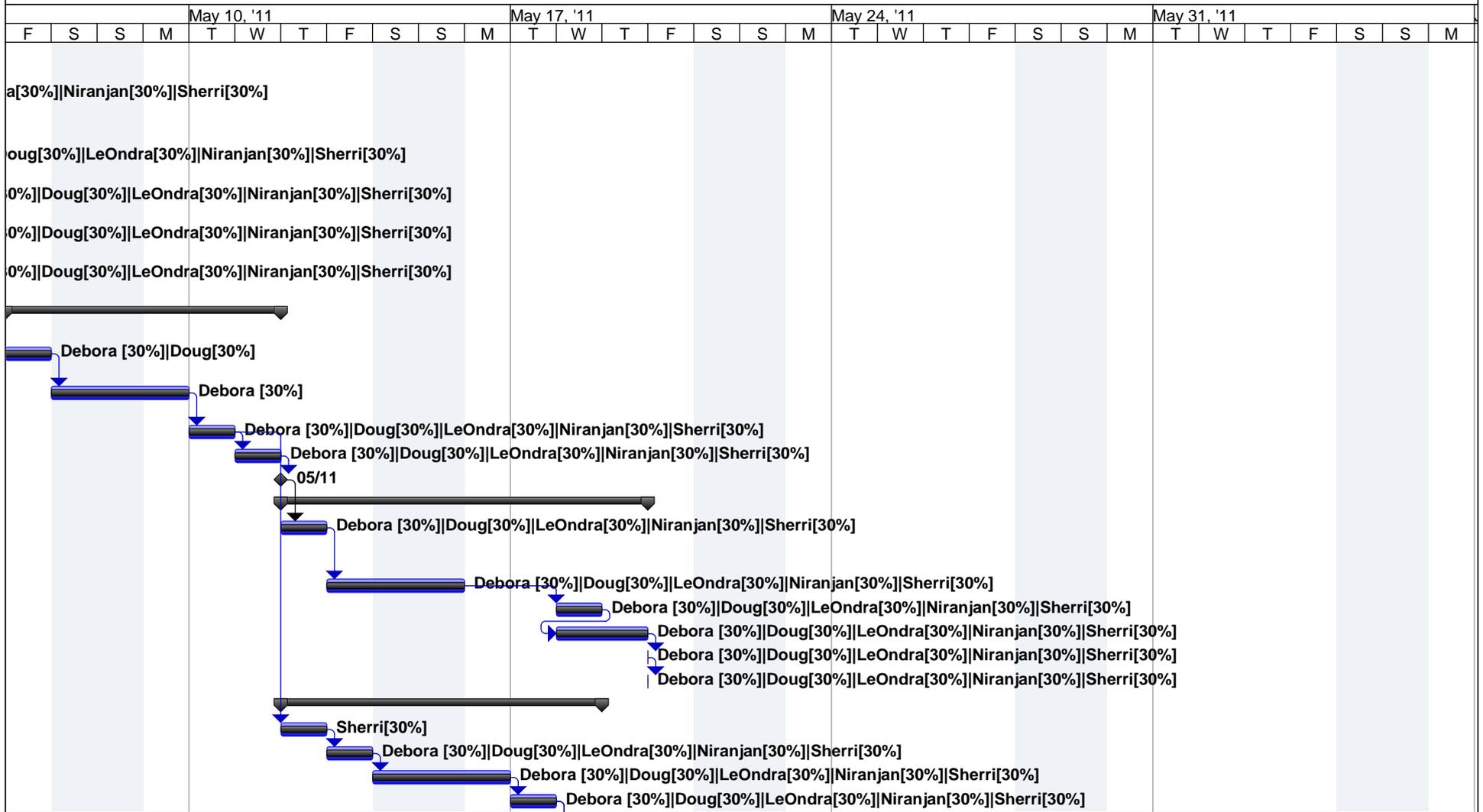
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Ohio's Talent: Tomorrow and Beyond



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Ohio's Talent: Tomorrow and Beyond

May 10, '11				May 17, '11							May 24, '11							May 31, '11													
F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M
											LeOndra[30%]																				
											Debora [30%] Doug[30%] LeOndra[30%] Niranjan[30%] Sherri[30%]																				

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## HUMAN RESOURCE MANAGEMENT PLAN

### ROLES AND RESPONSIBILITIES

Roles and responsibilities of team members must be clearly defined in any project. Depending on the structure, project team members may represent many different functions.

The following project team roles and responsibilities have been identified:

Role	Name	Responsibilities	Knowledge / Skills
Project Leader Co-Leader	Debora Doug	<ul style="list-style-type: none"> <li>▪ Define overall project direction</li> <li>▪ Provide guidance and assistance on task completion</li> <li>▪ Drive team for results and outcomes</li> </ul>	<ul style="list-style-type: none"> <li>▪ Project Management</li> <li>▪ Self-awareness</li> <li>▪ Situational Leadership</li> <li>▪ Pre-Planning</li> </ul>
Subject Matter Experts	Team	<ul style="list-style-type: none"> <li>▪ Specific Content Knowledge in Succession Planning and PMP</li> <li>▪ Agency/Office historical information</li> <li>▪ Liaison with agency/office areas</li> </ul>	<ul style="list-style-type: none"> <li>▪ Written / Verbal Communications</li> <li>▪ Human Resource expertise</li> <li>▪ Succession Planning expertise</li> <li>▪ Project Management</li> </ul>
Technical Support	Niranjan Sherri Debora	<ul style="list-style-type: none"> <li>▪ SharePoint expertise</li> <li>▪ PowerPoint expertise</li> <li>▪ MS Project expertise</li> </ul>	<ul style="list-style-type: none"> <li>▪ Computer</li> <li>▪ Software programs</li> <li>▪ Project Management</li> </ul>
Researcher	Team	<ul style="list-style-type: none"> <li>▪ Data gathering</li> <li>▪ Date analysis and interpretation</li> <li>▪ Website management</li> </ul>	<ul style="list-style-type: none"> <li>▪ Critical Thinking</li> <li>▪ Facilitation</li> <li>▪ Mediation</li> </ul>
Presenters	Team	<ul style="list-style-type: none"> <li>▪ Design/Development of Final Presentation</li> <li>▪ Presentation branding</li> <li>▪ Clarity of thoughts/outcomes</li> </ul>	<ul style="list-style-type: none"> <li>▪ Critical Thinking</li> <li>▪ Grammatical expertise</li> <li>▪ Editing and concise thought</li> </ul>
Utility Person	LeOndra	<ul style="list-style-type: none"> <li>▪ Damage Control</li> <li>▪ Risk Identification and contingency planner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Mediation and Facilitation</li> <li>▪ Gatekeeper</li> <li>▪ Relationship Management</li> </ul>
Team Members	Team	<ul style="list-style-type: none"> <li>▪ Follow Ground Rules and team norms</li> <li>▪ Assignment delivery</li> <li>▪ Active Contributor</li> <li>▪ Accountability</li> </ul>	<ul style="list-style-type: none"> <li>▪ Self Awareness</li> <li>▪ Social Awareness</li> <li>▪ Agile/Flexible</li> <li>▪ Planning and execution</li> <li>▪ Facilitation</li> </ul>

## RESOURCE CALENDAR

Every Tuesday from 8:30-5:00 team works on and complete team/individual assignments. Additional hours, as assigned, will not to exceed 4 hours per week.

## GROUND RULES

- Attendance is important: Communicate when you will be late or miss a meeting
- Timeliness: Deliver and communicate on time
- Demonstrate respect and dignity to all team members
- Demonstrate open communication and flexibility
- Decision making will be done by consensus, majority rules
- 48 hour response time for acknowledgment of communication

## TRAINING / TEAM BUILDING

DATE	TYPE OF EVENT
4/05/11	All day team building training & activities
4/12/11	Training & team building, bonding, trust
4/19/11	Boston Market Luncheon
4/26/11	2 Truths and a Lie Activity
5/03/11	Training video
5/10/11	Off-Site Team Meeting / Darby Luncheon
5/17/11	Indian Restaurant Dinner

## PERFORMANCE EVALUATION

Team Members will evaluate self and others on pre-determined categories and criteria to insure full participation and resource utilization. Peer evaluations will be conducted NLT week 5.

## RECOGNITION AND REWARD

At the end of the team presentation session members will meet for a celebratory dinner at a fine dining Indian Restaurant.

## SPONSOR ACCEPTANCE

Approved by the Project Sponsor:

\_\_\_\_\_  
Nelson Gonzalez  
DAS PMP Manager

Date: \_\_\_\_\_

## Project Communications Plan

<b>Project Name:</b>	Ohio's Talent Tomorrow and Beyond							
<b>Project Sponsor:</b>	Department of Administrative Services (DAS)							
<b>Project Team:</b>	Branham, Chaney, Cummings, Kumar, Lowe							
Event	Target Audience	Message Objective	Timing	Vehicles	Sender	Feedback Mechanism	Impacts	Comments
<b>Project Core Team Meeting communication</b>	Team	Communicate and confirm all decisions or agreements made, and any action items (with the assignee established) during the Core Team meeting.	Daily	Electronic Mail, Face-to-Face, SharePoint	Team	Electronic Mail, Face-to-Face, SharePoint	Low	On target
<b>Weekly Project Status Updates</b>	Team, Project Sponsor	Project's status, high level achievements and any possible risks or issues, including conflicts.	Every Tuesday, by EOD.	Face to Face Meeting	Team	Electronic Mail, Face-to-Face, SharePoint	Low	On target
<b>Meeting Agenda</b>	Team	Communicate action items, project schedule, outstanding items	Every Tuesday, by EOD.	Face to Face Meeting	SharePoint	N/A	Low	On target
<b>High Level Project Status Updates</b>	Project Sponsor, Team	Update sponsor on status of project	Every Tuesday, by EOD.	Face to Face Meeting	Team	Electronic Mail, Face-to-Face, SharePoint	Medium	On target
<b>High Level Project Status update and presentation</b>	Project Sponsor, Team	Deliver presentation	17-May-11	Face to Face Meeting	Team	Face-to-Face	Medium	

## Ohio's Talent for Tomorrow and Beyond

Succession Planning for State of Ohio Government Agencies

Name	Department	Role	E-mail	Primary Number	Secondary Number		
Debora Branham	Health	Team Member	<a href="mailto:Debora.Branham@odh.ohio.gov">Debora.Branham@odh.ohio.gov</a>	466-0404	264.2193	Agenda	
Doug Chaney	Job & Family Services	Team Member	<a href="mailto:Doug.laschaney@odjfs.state.oh.us">Doug.laschaney@odjfs.state.oh.us</a>	728-2831	765.623.3312	Agenda	
LeOndra Cummings	Commerce	Team Member	<a href="mailto:LeOndra.Cummings@com.state.oh.">LeOndra.Cummings@com.state.oh.</a>	995-7008	203.4499	Agenda	
Niranjana Kumar	Health	Team Member	<a href="mailto:Niranjana.Kumar@odh.ohio.gov">Niranjana.Kumar@odh.ohio.gov</a>	644-6898	806.9722	Agenda	
Sherri Lowe	Education	Team Member	<a href="mailto:Sherri.Lowe@ode.state.oh.us">Sherri.Lowe@ode.state.oh.us</a>	728-2766	753.5913	Agenda	

## Project Risk Registry / Log

Project Risk Registry / Log											
<b>Project Name:</b>	Ohio Talent Tomorrow and Beyond										
<b>Project Sponsor:</b>	Department of Administrative Services (DAS)										
<b>Project Team:</b>	Branham, Chaney, Cummings, Kumar, Lowe										
Date Identified	Risk ID	Risk Description	Category	Potential Impact	Risk Owner	Probability of Occurrence (1-5)	Impact of Risk (1-5)	Risk Level (1-25)	Response Type	Risk Response Plan	Status
04/08/11	1	Time constraints with team members.	Deadline	Delay in deliverable	Team	1	4	4	Mitigation	Project Schedule	New
04/08/11	2	Loss of a team member.	Workload	Additional work assignments.	Team	1	2	2	Transference	Resource Allocation	New
04/08/11	3	Too much information to manage, scope creep.	Quality	Difficulty in narrowing down tools/processes.	Team	2	2	4	Mitigation	Charter & Scope	New
04/08/11	4	Aggressive timeline requiring team to move fast to complete the project.	Quality	Team members may become frustrated in balancing understanding and completing quality work timely.	Team	1	2	2	Mitigation	Human Resource Plan and Schedule	New
04/08/11	5	Lack of inclusive planning with key stakeholder (e.g., DAS).	Execution	Creating processes may not align to DAS long-term strategies.	Team	1	2	2	Mitigation	WBS Schedule	New
04/09/11	6	Team not able to identify statewide leadership competencies required for leadership over the next four years.	Execution	Agencies may not be able to identify critical leadership competencies, which could hinder adopting the framework.	Agency	1	2	2	Transference	WBS Schedule	New
04/09/11	7	Team unable to assess agencies' culture to determine if the proposed framework may be adaptable for all agencies.	Execution	Agency leaders may resist or may not embrace the proposed framework due to lack of capability to implement.	Agency	1	2	2	Transference	WBS Schedule	New
04/09/11	8	Team unable to conduct an comprehensive assessment of agencies' strategic direction for the next four years.	Execution	Framework that may not align to agency strategic priorities or various business challenges.	Agency	1	2	2	Transference	Human Resource Plan	New