

DAS – Dashboard Framework

November 8, 2011



Project Summary

As part of the strategic planning process being conducted by DAS leadership, surveys were conducted to gather input from DAS employees. This project management team is to create dashboard schematics that will assist in the completion of a DAS dashboard that will have indicators of how they are progressing through surveys.

Project Goal

DAS has requested our team to analyze existing data and develop schematics of a possible dashboard that will assist in future surveys. Currently DAS lacks having a tool with the ability to analyze the results and have them viewable at a glance. The dashboard will provide an easy method to display and interpret survey data to aid in decision making.

Project Outcome

Dashboard Development Framework:

- Dashboard (top-level and second-level schematics; third-level if time allows)
- Description of inputs and steps that feed the dashboard
- Implementation recommendations for key DAS developers and implementers

Project Benefits

Creation of the dashboard schematics and user guide that will display results for future DAS surveys and can be implemented and repeated for use by multiple agencies and surveys over time.

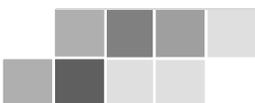
Products/deliverables:

- Dashboard (top-level and second –level Schematics; Third level if time allows)
- User tip and instruction (users guide)
- Description of inputs and steps that feed the dashboard
- Implementation recommendations for key DAS developers and implementers

Project Team

For more information about this project, contact team members

- Kevin Kent — Kevin.Kent@odh.state.oh.us
- Irene Barnett – Irene.Barnett@bwc.ohio.gov
- Bob Greene — Robert.Greene@com.state.oh.us
- Mike Azad — Mike.Azad@mh.ohio.gov
- Ron Meade — Ron.M.4@bwc.state.oh.us
- Mentor – Coach: Nelson Gonzalez



DAS Survey Dashboard



Overview

Dashboard, The purpose of a dashboard is to provide the user with actionable business information in a format that is both intuitive and insightful.

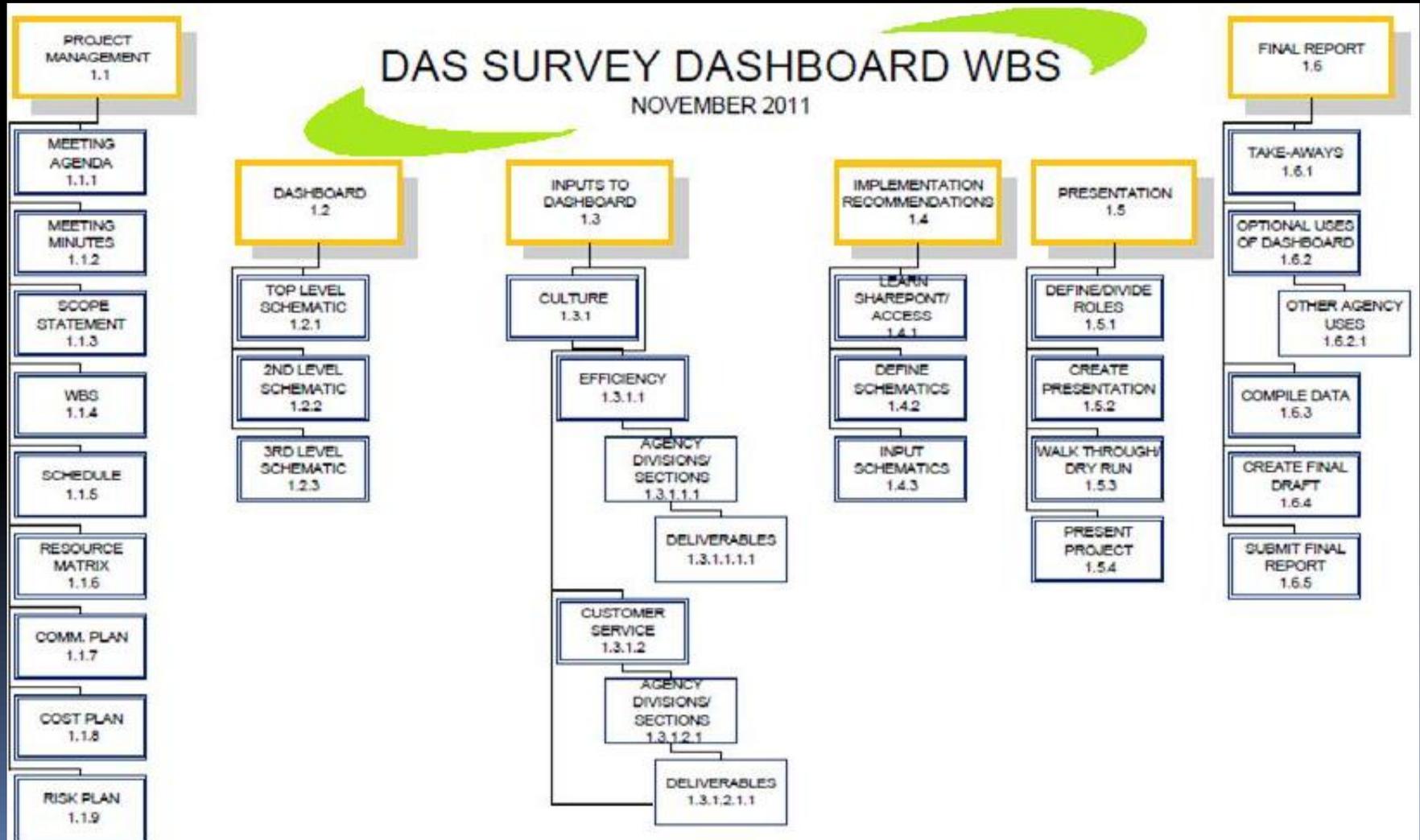
Agenda

- 1 Introduction
- 2 Objectives
- 3 WBS, Schedule & Cost
- 4 Risk & Human Resource Management
- 5 Communication & Quality Management
- 6 Proposed Dashboard Revealed
- 7 Closing Statements & Questions

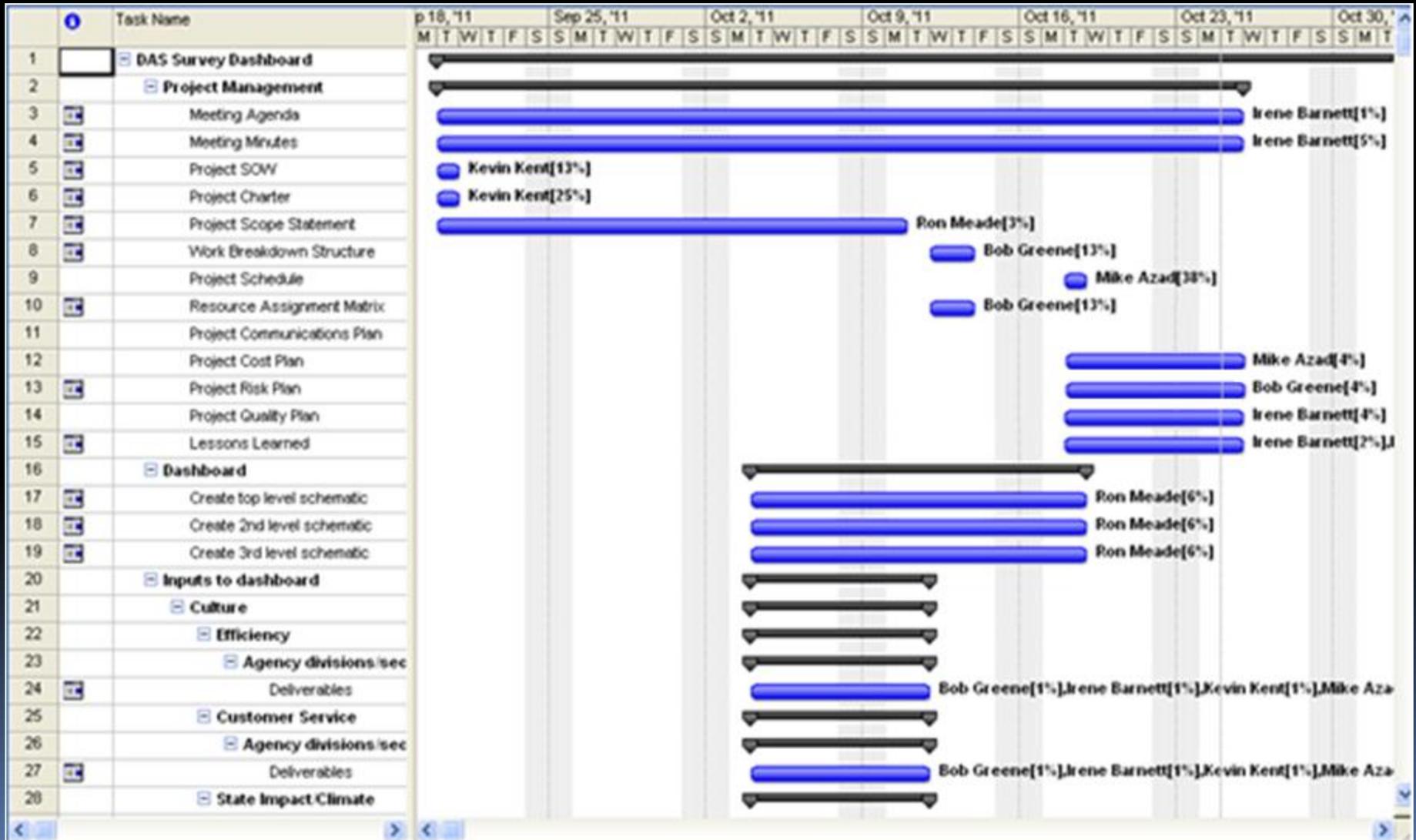
Project Team

- **Kevin Kent – Project Manager (Department of Health)**
- **Mike Azad – Team Member (Department of Mental Health)**
- **Bob Greene – Team Member (Department of Commerce)**
- **Irene Barnett – Team Member (Ohio Bureau of Workers' Compensation)**
- **Ron Meade – Team Lead (Ohio Bureau of Workers' Compensation)**

Work Breakdown Structure (WBS)



Project Schedule



Cost Plan

Project Cost and Procurement are as Follows:

Estimated Cost

Estimated hours for five people	240
Cost per Hour	\$40.
Total For Estimated Cost	\$9,600.

Actual Cost

Actual hours for five people	260
Cost per Hour	\$40.
Total For Estimated Cost	\$10,400.



Cost Variance

Initial Estimated Budget	\$9,600.
Actual Budget Cost	\$10,400.
Actual Cost Variance	\$800.

Risk Management

What is Risk Management?



Risk Management

Why is it important?



Risk Management

Risk Analysis

Risk ID & Description	Category	Potential Impact	Probably (1-5)	Impact (1-5)	Risk (1-25)	Risk Response Plan
1. Lack of Knowledge of Dashboard Technology from Project team members	Internal risk	Project Delay	2	5	10	Avoid the risk by assigning the learning of Dashboard Technology to team member
2. Scope of the Project changes	External risk	Project Delay	2	5	10	Out of team's control. Stay in communication with project sponsor. Close communication with project mentor if changes occur
3. No funding for additional resources to complete project/product (dashboard)	External risk	Not meeting project deliverables	5	4	20	Extensive product research, communication between sponsor & project team
4. Participation & availability of them members to complete assigned tasks	Internal risk	Imbalance of workload / project deadline	1	5	5	Project Team Members have buy-in to project & finished product. Good communication
5. Six week project timeline restriction	Project Management Risk	Project / Product not completed	1	5	5	Communication, finish all assigned tasks, present project/product on time

Risk Management

SWOT Analysis



Human Resource Management

What is Human Resource Management?



Human Resource Management

Why is it important?



Human Resource Management

Resource Assignment Matrix

R = Responsible A=Accountable S = Support C = Consult I = Inform							
Activity	Kevin	Irene	Bob	Ron	Mike	Nelson	Tom
Project Charter	R	S	S	S	S	I	C
Project Scope Statement	S	S	S	R	S	I	C
WBS	S	S	R	S	S	I	I
Project SOW	R					I	C
Project Management Plan	R	R	R	R	R	I	I
Project Schedule	S	S	S	S	R	I	I
Resource Assignment Matrix	S	S	R	S	S	I	I
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Project Cost Plan	S	S	S	S	R	I	I
Project Risk Plan	S	S	R	S	S	I	I
Project Quality Plan	S	R	S	S	S	I	I
Meeting Agendas	S	R	S	S	S	I	I
Meeting Minutes	S	R	S	S	S	I	I
Project Procurement Plan	S	S	S	R	S	I	I
Lessons Learned	R	R	R	R	R	I	I
Project Report	S	S	S	R	S	I	I
Project Presentation	R	R	R	R	R	I	C

Communications Plan

One message can be expressed in many ways...

Bienvenidos

WELCOME

欢迎



Communications Plan

Project Name:	DAS Employee Survey Dashboard
Project Sponsor:	DAS – Tom Terez
Project Manager:	Kevin Kent

Event	Target Audience	Message Objective	Timing	Vehicles	Sender	Impacts
Project Core Team Meeting's Agenda and Minutes	Project Team Nelson Gonzales and Tom Terez	1.) review of assigned action items 2.) review of the project status 3.) address outstanding issues.	Weekly	Electronic Mail	Irene Barnett	Provided meeting structure.
Project Core Team Meeting communications	Project Team Nelson Gonzales and Tom Terez	Example: Communicate and confirm all decisions or agreements made, and any action items (with the assignee established) during the Core Team meeting.	At least weekly or sooner if needed.	Electronic Mail	All team members	Provided documentation for project team of the weekly discussion . .
Weekly Project Status Updates	Project Team Nelson Gonzales and Tom Terez	Project's status, high level achievement and any possible risks or issues, including conflicts.	Every Week	Example: Electronic Mail	All team members	Provided documentation of project team work.
Special Meeting with DAS	Met with Director Blair and Tom Terez On October 4 2011 on project scope.	Opportunity to discuss Director Blair's idea of this project and deliverables to finalize the team's scope statement.	October 4 2011	In person	Project team Tom Terez Director Blair	The team gained knowledge of the agency, the leadership direction and strategies for the use for the dashboard.
Meeting & communications with Sponsor	Communications with Tom Terez to clarify and confirm project scope.	To make sure that the team scope statement and work is documented and approved by sponsor.	September 27 2011 October 3, 2011 October 4, 2011 October 10, 2011 October 11, 2011	In person and Electronic Mail	Project team Tom Terez	The team gained knowledge of the scope of work , the direction and strategies for the use for the dashboard

Quality Management Plan

Total Quality Management: *Everyone in the organization is responsible for quality.*

- Quality of DAS
- Quality of Dashboard
- Quality of Project
- Quality of Presentation

**Survey
DASHBOARD**



Efficiency

- [Link to Current Survey](#)
- [Past DAS Surveys](#)
- Other
- [Submit Suggestions and Ideals](#)



Culture



Climate

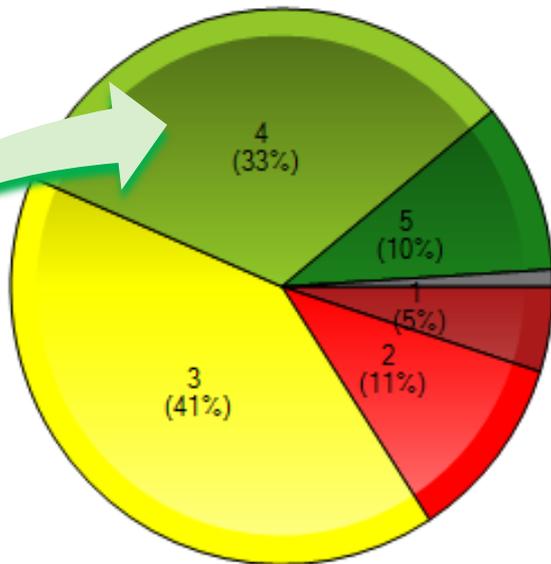


Service

Climate

SURVEY DASHBOARD LEVEL 2

Overall Satisfaction



Legend

	5	Very Satisfied
	4	
	3	
	2	
	1	Not at all Satisfied
		Don't Know
		Indicates statistically significant increase since the last survey
		No significant change or no history
		Indicates statistically significant decline since the last survey

Climate

Survey Dashboard Details LEVEL 3-A

Survey Question Number 1: will be shown here

Results will be show in a detailed description here.

Details Trends

Date Range	District	Measure	Score 1 (%)	Score 2 (%)	Score 3 (%)	Score 4 (%)	Score 5 (%)
2006	[Statewide]	[Overall Satisfaction	6%	12%	42%	29%	10%
Spring (May) 2007	[Statewide]	[Overall Satisfaction	5%	13%	35%	37%	10%
(January) 2008	[Statewide]	[Overall Satisfaction	4%	12%	39%	35%	9%
(July) 2008	[Statewide]	[Overall Satisfaction	5%	11%	40%	33%	10%
(January) 2010	[Statewide]	[Overall Satisfaction	6%	12%	42%	31%	8%
(September) 2010	[Statewide]	[Overall Satisfaction	5%	11%	41%	33%	10%

Print Detail

Export to Excel

Climate

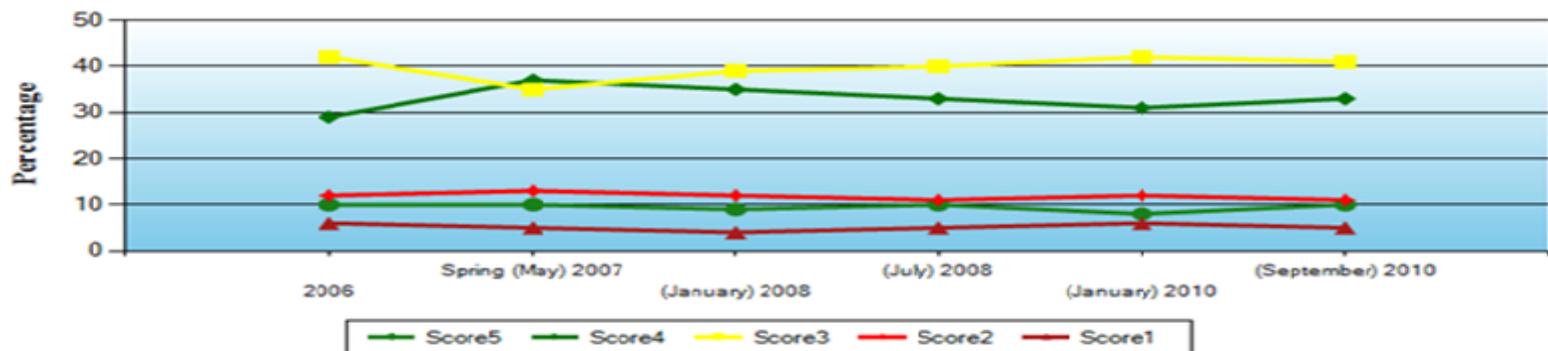
Survey Dashboard Trends Level 3-B

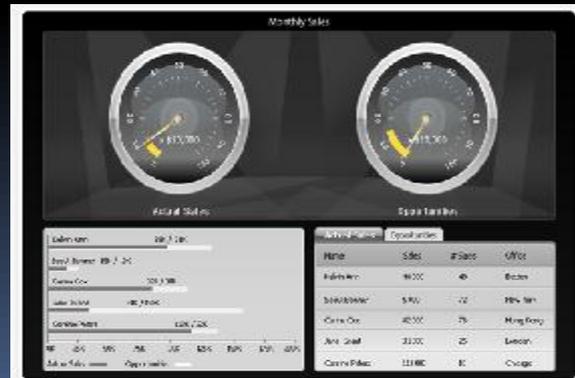
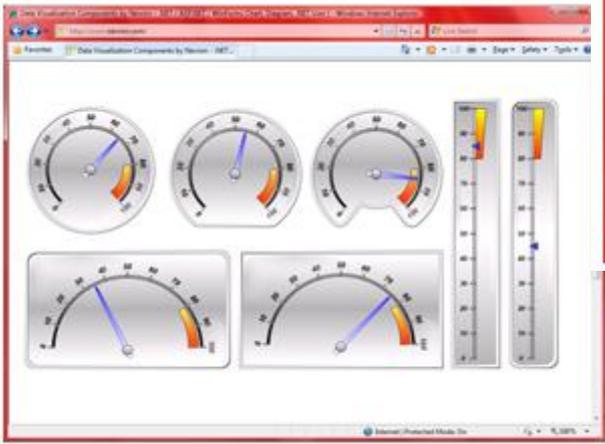
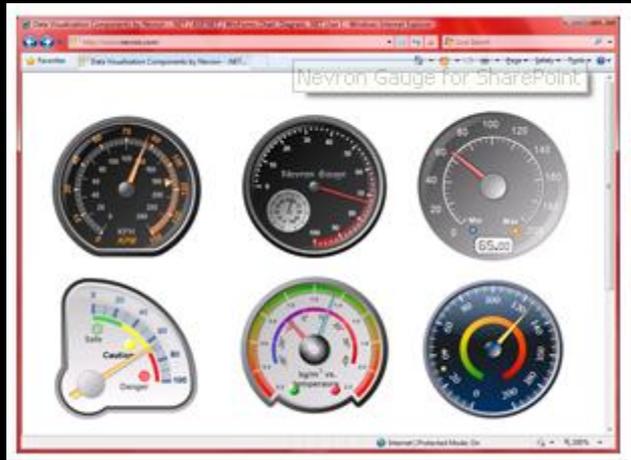
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Det Trends

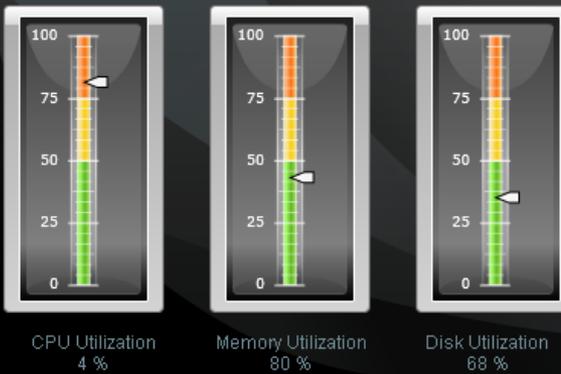
Satisfaction Survey Ratings





Traffic Servers Monitoring

Monitors > Web Server > server.bg.monitoring.com_web_server_10101



Network Adapters	Sent Kbps	Received Kbps	Packet Sent	Packet Sent
netName	60	80	25	70

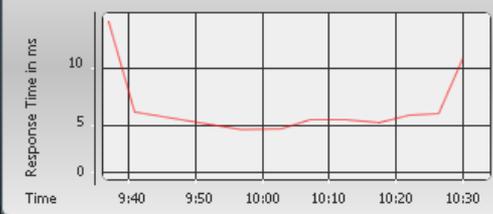
Storage Adapters	Write Kbps	Read Kbps	Number Writes	Number Reads
hbaName	5000	3000	4000	700

Home Monitors Reports Support

Response Time - Last One Hour

Attribute	Value	Threshold
Current Response Time	6 ms	<input checked="" type="checkbox"/>

[Configure Alerts](#)



Monitor Information

Name	server.bg.monitoring.com_web_server_10101
Health	●
Type	Web - server
Post	18006
Host Name	server.bg.monitoring.ad... (187.158.105.306)
Host OS	Linux
Last Polled at	Dec 17, 2008 10:40 Am
Next Poll at	Dec 17, 2008 10:40 Am



PROJECT IDENTIFICATION		
Project Name	Project Sponsor	Agency Name
Employee Survey Dashboard	Tom Terez	Administrative Services
Project Number (Finance Code – Optional)	Project Manager	Date Created
	Kevin Kent	October 1, 2011

PROJECT MANAGER AND AUTHORITY LEVEL
Project Manager and Level of Authority
<p>The Project Manager, Kevin Kent, is 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 Manager is responsible for developing the project plan, monitoring the project's schedule, control of the project's scope and authorized to spend the project's budget during the project's life cycle.</p>

APPROVAL			
Name	Title	Date	Approved
Tom Terez	Lean Ohio	10/18/2011	< Yes, No, Pending >

Tom Terez (Per Tom's e-mail, electronic Sign Off)

Signature
(If Using Hard Copy)

PROJECT CHARTER

Project Background and Purpose

As part of the strategic planning process being conducted by DAS leadership, surveys were conducted to gather input from DAS employees. This project management team is to create dashboard schematics that will assist in the completion of a DAS dashboard that will have indicators of how they are progressing through surveys.

Business Case

DAS has requested our team to analyze existing data and develop schematics of a possible dashboard that will assist in future surveys. Currently DAS lacks having a tool with the ability to analyze the results and have them viewable at a glance. The dashboard will provide an easy method to display and interpret survey data to aid in decision making.

Product/Service Description and Deliverables

Dashboard

- Dashboard (top-level and second-level schematics; third-level if time allows)
- Description of inputs and steps that feed the dashboard
- Implementation recommendations for key DAS developers and implementers
- Presentation
- Final report

Project Timeline

September 20 – November 1, 2011

Tasks :

- Information gathering will be done September 20 – 27
- Review and Analysis of guiding principles September 27 – October 4
- Dashboard Schematics development October 4 – October 25
- Inputting data into dashboard October 4 – October 25
- Dashboard Test October 11 – October 25
- Presentation November 1

Project Objectives
<p>Dashboard Options for users - SharePoint Build Dashboard in SharePoint, schematics in Visio Data input Compile team segments into final presentation Final report</p>
Initial Risks
<ul style="list-style-type: none"> • Lack of knowledge of Dashboard technology • Scheduling constraints • Team participation • Approval • Scope Changes

Communications Plan					
Event	Stakeholder s	Objective	Frequency	Mode	Sender
Meeting Agenda	Ron Meade Kevin Kent Bob Greene Mike Azad	Provide list of topics and tasks for the meeting	Weekly	Face to Face	Irene Barnett
Meeting Minutes	Ron Meade Kevin Kent Bob Greene Mike Azad	Provide documentation of each week 's discussion and work	Weekly	Email & Face to Face	Irene Barnett
Project sponsor meeting	DAS- Tom Terez	Project Status	Weekly	Face to Face & email	Kevin Kent
Scope Change	Project Team & Project Mentor	Get input for dashboard schematic & final presentation	One day	Face to face	Project Team & Mentor
End of project Presentation	Managers DAS sponsors PM class	Share Dashboard & results	End of project	Face to Face	Ron Meade, Kevin Kent, Bob Greene, Mike Azad, Irene Barnett

PROJECT SCOPE

PROJECT OVERVIEW

Project Scope Statement

Project name: DAS Employee Survey Dashboard

Department: Department of Administrative Services

Project Manager: Kevin Kent

Project Sponsor: Tom Terez

Date: Sept 27, 2011

Project Business Case:

Department of Administrative Services (DAS) has requested our project management team to develop a schematic of a dashboard for survey results that will show a top level (of what users will see as the main opening screen), a secondary level (of what user will see with a little more in-depth look, and a possible third level of design that will allow a more in-depth look of the second level.

Project Product/ Description:

Dashboard (user interface that organizes and presents information in a way that is easy to read) that can be used for displaying survey data. For this project – we will be using DAS's recent employee survey as a sample to create the schematics and possible model of the dashboard tool. The value of this project is to create a dashboard that will be user friendly and the will provide feedback to employees on the agency's Culture, Efficiency, Service and Climate.

Product acceptance criteria:

Creation of the dashboard schematics and user guide that will display results for future DAS surveys and can be implemented and repeated for use by multiple agencies and surveys over time.

Products/deliverables :

- Dashboard (top-level and second –level Schematics; Third level if time allows)
- User tip and instruction (users guide)
- Description of inputs and steps that feed the dashboard
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- Presentation
- Final report

PROJECT SCOPE (CONTINUED)

PROJECT OVERVIEW CONTINUED

Project exclusions:

Building new survey package
Implementation survey results

Project Constraints:

Availability of team
Lack of dashboard development expertise
Team was not part of the survey development
Team members are not DAS employees
Team members are not DAS employees impacting understanding of organization, environment, climate, terminology and culture.
Lack of funding

Project Assumption:

Survey content will not impact dashboard schematics
A dashboard is the preferred tool for customer
Team members are available on Tuesdays throughout project
Deliverables will be completed on time
No procurement activities

Project timeline:

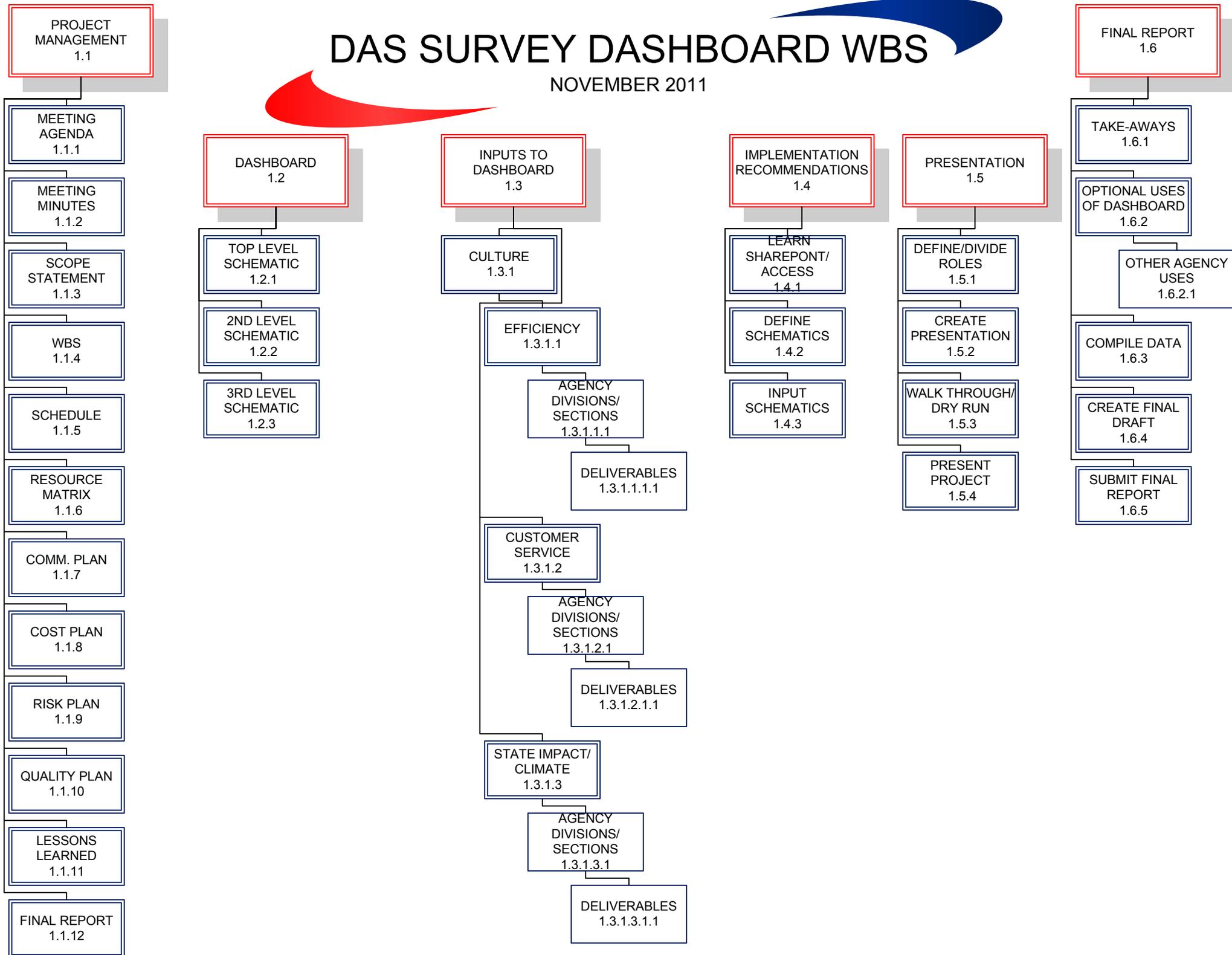
Sept 20 – Nov 1 2011

Risks

Lack of knowledge of Dashboard technology
Sponsor terminates project
Sponsor changes scope
Miscommunication between team members
Miscommunication between project sponsor and team
Team member availability
Scheduling constraints
Team participation

DAS SURVEY DASHBOARD WBS

NOVEMBER 2011



COST MANAGEMENT

Estimated Cost	Estimated hours for five people	240
	Cost per Hour	\$40.
	Total For Estimated Cost	\$9,600.
Actual Cost	Actual hours for five people	260
	Cost per Hour	\$40.
	Total For Estimated Cost	\$10,400.
Cost Variance	Initial Estimated Budget	\$9,600.
	Actual Budget Cost	\$10,400.
	Actual Cost Variance	\$800.

- Project completed on time, however over budget in man hours
- There was a cost Variance of \$800., as to our initial cost projection
- Additional resources will be needed for completion of a working model

QUALITY MANAGEMENT

Total Quality Management: *Everyone in the organization is responsible for quality.*

Based on the team's meeting with Director Blair and sponsor Tom Terez , it is clear that DAS desires to be a high quality service provider to its internal and external customers as well as a desirable employer.

The quality of the dashboard as a true indicator of DAS's culture, gauged by service, climate and efficiency will be based on the timeliness of the information gathered, honesty and trust of the employees surveyed and the interpretation and analysis of the dashboard readings.

The quality of this project plan is also based on everyone's contribution to the idea that we want absolute customer and sponsor satisfaction that the deliverables precisely follow the requirements of the scope.

For today's presentation - attention to quality were considered for :

Visual integrity and relevance of handouts

Simplicity of project steps and project management messages

Relevance and usefulness of recommendations , resources and links; and

Implementation of the Dashboard

RESOURCE ASSIGNMENT MATRIX

R = Responsible A=Accountable S = Support C = Consult I = Inform							
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Project SOW	R					I	C
Project Management Plan	R	R	R	R	R	I	I
Project Schedule	S	S	S	S	R	I	I
Resource Assignment Matrix	S	S	R	S	S	I	I
Project Communications Plan	S	R	S	S	S	I	I
Project Cost Plan	S	S	S	S	R	I	I
Project Risk Plan	S	S	R	S	S	I	I
Project Quality Plan	S	R	S	S	S	I	I
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Meeting Minutes	S	R	S	S	S	I	I
Project Procurement Plan	S	S	S	R	S	I	I
Lessons Learned	R	R	R	R	R	I	I
Project Report	R	S	S	R	S	I	I
Project Presentation	R	R	R	R	R	I	C

Project Communications Plan

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Project Manager:	Kevin Kent

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Name	Department	Role	E-mail	Primary Number	Secondary Number
Nelson Gonzalez	Project Management	Mentor and Instructor	Nelson.gonzalez@das.ohio.gov	614-466-4210	614-370-5241
Tom Terez	DAS	Sponsor	Tom.terez@das.state.oh.us	614-466-2326	
Kevin Kent	Dept of Health	Project Lead	Kevin.Kent@odh.ohio.gov	614-728-4117	614-329-0017
Ron Meade	Bureau of Workers Compensation	Team Member	Ron.M.4@bwc.state.oh.us	614-466-0363	614-370-8399
Irene Barnett	Bureau of Workers Compensation	Team Member	Irene.Barnett@bwc.state.oh.us	614-728-5511	614-307-7459
Bob Greene	Dept of Commerce	Team Member	Robert.Greene@com.state.oh.us	614-728-9670	614-264-4158
Mike Azad	Dept of Mental Health	Team Member	Mike.Azad@MH.ohio.gov	614-752-8704	614-736-0314

RISK PLAN

RISK REGISTER

Risk ID & Description	Category	Potential Impact	Prob. (1-5)	Impact (1-5)	Risk (1-25)	Risk Response Plan
1. Lack of knowledge of Dashboard Technology from project team members	Internal risk	Project delay	2	5	10	Avoid the risk by assigning the learning of Dashboard Technology to team member
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5. Six week project timeline restriction	Project Management risk	Project/ Product not completed	1	5	5	Communication, finish all assigned tasks, present project/product on time

SWOT ANALYSIS

