

Project Name:	Department of Energy BMIS-FM
Project Number:	BMIS-FM Phase I
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STAFF MANAGEMENT PLAN for
Department of Energy BMIS-FM Project

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Approvals

The following people have approved this document. (Sign below name)

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Don A. Cox	Team IBM Program Manager
Signature:	Date:

Distribution

This document has been distributed to:

Name	Function

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Staff Management Plan

1. Objectives

- 1.1. The purpose of this document is to describe the project team organization structure, when and how human resources will be brought onto and taken off the project team.

2. Expected Stability of Project Staffing

- 2.1. All resources on the project team are either DOE employees or Team IBM employees. Currently, the Team IBM (IBM, Oracle, SAIC, Arthur Andersen, BCS, etc.) resources are primarily dedicated to this project, or have specific periods of activity identified in the project plan. DOE employees will be allocated as full time, 50%, or less.
- 2.2. The project will be conducted in a matrixed organization. Some DOE resources assigned to this project initiative may be subject to ongoing operational resource requirements that take precedence. The project team will make every effort to identify where scheduling challenges or conflicts may exist, and plan accordingly.

3. Organizational Structure

- 3.1. The organizational structure as defined reflects the importance of the BMIS-FM project to the Department.
- 3.2. The Team IBM project manager is ultimately accountable to the DOE project manager, who has been designated both the 'contracting officer's technical representative' or COTR, and the 'contracting officer's representative' or COR. More importantly, both project managers are ultimately accountable for the satisfaction of the stakeholders once the product is delivered. With accountability and responsibility, there is a need for authority. Hence, the organization structure chart reflects the authority of the project manager to direct project resources in successfully completing project activities.
- 3.3. The project team and stakeholders will be comprised of individuals from various groups including:
 - 3.3.1. DOE financial service centers at Germantown, MD; Oakridge, TN; Albuquerque, NM.
 - 3.3.2. DOE satellite offices, Headquarters and program staff.
 - 3.3.3. CR-40 (MARS) and program offices.

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- 3.3.4. Team IBM business partners.
- 3.3.5. Other external organizations (M&O, M&I Contractors)
- 3.4. The basic organization structure of the Department remains unchanged, and the project organization will be based on a matrix model where the project managers must coordinate resources from various groups and organizations to meet project objectives.
- 3.5. The project organization chart has been published as a separate document, and is incorporated here by reference. This document will be periodically updated.
- 3.6. Organizational impact.
 - 3.6.1. By implementing a matrix model to meet project objectives, the project manager is limited in terms of direct authority in coordinating project resources. However, the project manager has access to all necessary direct authority. The preferred strategy will be to rely on leadership, persuasion, and influence.
 - 3.6.2. Some project resources will continue in their current day-to-day assignments. This creates conflict in their job roles and responsibilities as they balance project objectives with ongoing operational requirements. This will be monitored and addressed as necessary.

4. Staff Transitions

- 4.1. Because of the geographic dispersal of the organization, and the limited office space available within the Germantown, MD DOE headquarters, a separate office facility will be available (offices located at 20300 Century Blvd.). Team IBM will be collocated for this project at the 20300 Century Boulevard site. Offices will be available for DOE project team members, many of whom will be collocated, while others will travel into Germantown, MD as necessary.
- 4.2. Entering Project
 - 4.2.1. In general, DOE employees function under the authority of the Department.
 - 4.2.2. The DOE project manager, in the capacity of the 'contracting officer's technical representative', has overall responsibility for the conduct of the BMIS-FM project.
 - 4.2.3. The DOE project support coordinator will facilitate the transition of new team members entering the project. Specific responsibilities include:



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- 4.2.3.1. Location of office space, desk, connectivity, telephone access, system access, office supplies.
- 4.2.3.2. Gather information from project team lead of new team members for completion of documentation required for security badge, property pass, access codes, and access keys if necessary. Route the documents for signature approval and submit to the appropriate issuing group. (NOTE: for weekend access, see your project team lead.)
- 4.2.3.3. Orientation as to where building facilities are located to include rest rooms, fax, copier, emergency exits, dining, meeting rooms, etc.
- 4.2.3.4. Gathering project roster information to include name, phone number(s), pager number(s), address, emergency contact, organization, organization supervisor, organization contact number(s), organization address.
- 4.2.3.5. A 'punch list' will be completed indicating successful completion of these activities.
- 4.2.4. Once the DOE project support coordinator has completed initial transition, Team IBM project teammates will meet with the Team IBM business manager to review processes for time keeping and work schedule.
- 4.2.5. Within the first week of arrival, each new teammate will schedule an initial meeting with the DOE project manager, and an initial meeting with the Team IBM project manager. This will last approximately 15 – 30 minutes, with the objective of providing an overview of project vision, policies and procedures, and to establish an open line of communications.
- 4.2.6. The individual team lead is responsible for meeting with the new teammate to:
 - 4.2.6.1. Establish role, responsibilities, method and schedule for status reporting.
 - 4.2.6.2. Dissemination and review of assigned project activities.
 - 4.2.6.3. Provide the new teammate with a copy of the Project Team Charter and review this important document with them.
 - 4.2.6.4. Identify any preliminary documents or reference materials provided by the Department or gathered

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during interviews or analysis activities for review by the new team member, with the primary objective being rapid acceleration through the initial learning curve.

4.3. Exiting Project

- 4.3.1. The Team IBM project manager will make every effort to ensure an orderly exit transition for both DOE and Team IBM teammates who will be exiting the project.
 - 4.3.1.1. The individual will receive as much lead time as possible indicating the planned project exit date based on the project schedule.
 - 4.3.1.2. For Team IBM teammates who will be exiting the project, the individual's employing organization will be notified as earlier as possible based on the project schedule.
- 4.3.2. If circumstances arise that mandate the preliminary removal of any individual teammate, the exit transition will be coordinated jointly by the DOE and Team IBM project managers.
- 4.3.3. The exiting individual will meet with their team lead to finalize any project status reporting, activity completion, and turnover of any project documents. The team lead is responsible for requesting that the exiting individual's network and system access be removed.
- 4.3.4. The exiting individual will meet with the project support coordinator to turn in any badges, keys, or other items as necessary.
- 4.3.5. The exiting individual will schedule an exit interview the DOE project manager, and an exit interview with the Team IBM project manager. The purpose of these meetings is to provide the individual with an opportunity to air any issues, complaints or concerns, as well as any compliments or accolades. In addition, the project managers will take the opportunity to document any lessons learned.
- 4.3.6. Depending on the exiting individual's organization, the DOE or Team IBM will secure the individual's electronic files and electronic copies of any knowledge capital associated with the project to ensure an orderly transition.
- 4.3.7. DOE staff members will transition to other activities at the direction of the Department throughout the project. Depending on



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the individual situation, this may be at the end of a project phase, or upon completion of specific project activities.

5. Staffing Change Control Processes

- 5.1. The DOE project manager reserves the right to approve new staff members entering the project, or current project team members exiting the project for both Team IBM and Team DOE except in cases where the individual resigns or is discharged by IBM, Team IBM's business partners, or the Department.
- 5.2. The Team IBM project manager must approve any new Team IBM members entering the project, or current project team members exiting the project except in cases where the individual resigns or is discharged by IBM or Team IBM's business partners.
- 5.3. All modifications to this staff management plan must go through the following procedure:
 - 5.3.1. Identify and assess the potential change.
 - 5.3.2. Fill out a "*Change Request Form*" and submit the "*Change Request Form*" along with required supporting documentation to the Team IBM project manager.
 - 5.3.3. The Team IBM project manager will review the change request and may possibly request additional documentation prior to review with the DOE project manager.
 - 5.3.4. The Team IBM and DOE project managers will determine if the change should be:
 - 5.3.4.1. Approved, in which case both project managers will check the approved box, sign off on the change request and the Team IBM project manager will incorporate the change and adjust other project planning factors as necessary.
 - 5.3.4.2. Approved pending additional supporting documentation, in which case both project managers will check the approved / pending box, sign off on the change request and the Team IBM project manager will specify the further required documentation, incorporate the change and adjust other project planning factors as necessary.
 - 5.3.4.3. Denied, in which case both project managers will check the denied box, sign off on the change request and the

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Team IBM project manager will notify the requestor of the status and reason for denial.

- 5.3.5. The Team IBM project manager will document the Change Request outcome as necessary and modify impacted documents.

6. Associated Documents

- 6.1. Staffing Requirements
- 6.2. Assumptions and Constraints
- 6.3. Project Team Charter
- 6.4. Organization Chart
- 6.5. Project Support Coordinator's Staff Onboard Punch-list
- 6.6. Work Breakdown Structure
- 6.7. Project Schedule
- 6.8. Project Budget