

5- YEAR LONG-TERM DATA MANAGEMENT ACTIVITY WORK PLAN

Changes to this Work Plan are only accepted via an Approved Addendum.

General Information	
Monitoring Category: <i>(From OSM long-term plan; choose from drop-down menu)</i>	Standards, QA/QC, Data Mgt.
Strategic Monitoring Objective: <i>(From OSM long-term plan; choose from drop-down menu)</i>	Objective: Establish and Maintain an Integrated Data Management System for Archiving and Retrieval of Oil Sands Monitoring Program data.
Work Plan Unique Identifier:	D-8-1718
Monitoring Activity Title:	AEP Portfolio/Project Management System
Geographic Location <i>(choose from drop-down menu, if Project Location is in more than one area choose from second drop-down)</i>	Location Not Applicable
Monitoring Site(s) Coordinates <i>(latitude and longitude)</i>	N/A
Monitoring Organization and Responsible Manager:	Alberta Environment and Parks Rita Lazar-Tippe
Date Activity initiated:	2017
Specific Project Objective: <i>(State the activity objective)</i>	<p>It is expected that the project management system will be in production in 2017-18. The system will manage the full life-cycle of the Oil Sands Monitoring (OSM) projects; planning, project execution, resource tracking, financial tracking, deliverables and milestones status, progress reporting and various levels of dashboards. The project management system will contribute to the evolving maturity and best practices of project management practices within EMSD (Environmental Monitoring and Science Division), and address the concerns outlined in the OSM program Integrity review.</p> <p>All of the OSM EMSD proposed projects and the rest of the lifecycle of the projects will be housed within the project management system. This will provide one source for all project information both on a per project basis and rolled up for the entire OSM program that is managed by EMSD.</p>

Deliverables (Annual):				
<i>Milestone/ Deliverable</i>		<i>Start Date</i>	<i>Expected Completion Date</i>	<i>Human Resources (identify who and how many staff are delivering the activity)</i>
Deliverables (provide enough information to support status reporting)				
Q1 – April to June				
1.	<ul style="list-style-type: none"> • Plan <ul style="list-style-type: none"> • multiphase goals and objectives, deployment target audience, team members, timelines and milestones review, workshop scheduled • Build <ul style="list-style-type: none"> • Core environment setup with foundational data imported, training and walk-through, resource module setup, project module setup, dashboards • Project Management <ul style="list-style-type: none"> • Training, field definition, field setup, project scoping setup, task management setup, status reporting, filters and dashboards • Time Management <ul style="list-style-type: none"> • Summary level and task level tracking, scheduling resources, time entry and approval, reports and dashboard 	Apr. 1, 2017	June 30, 2017	Lead by Yemi Ilesanmi / Rita Lazar-Tippe PM – Elis Valera, SA – Jon Manuel / Massie Kitagawa

	<ul style="list-style-type: none"> • Resource Management workshop <ul style="list-style-type: none"> • Overview, top-down and bottom-up planning, resource allocation and scheduling, resource calendars, capacity and demand analysis and what-if scenarios • Demand Management workshop <ul style="list-style-type: none"> • Request management, client approval process, define approval requirements, request scoring, setup approval form, setup approval process and request scoring, reports and dashboard • Project Execution <ul style="list-style-type: none"> • Overview, detail task management fields, project team management, project calendars, scoring definition, scoring setup, task and health and issues/risk field definition, cost management, templates and status reports, dashboard filters • Configuration, Administration and Security workshop <ul style="list-style-type: none"> • Administration setting and configuration, user security and roles, setup for deployment • Executive reports and dashboards workshop <ul style="list-style-type: none"> • Reports, filters, dashboards training, review existing & modify/create executive reports and dashboards 			
<p>Q2 – July to September</p>				

<p>2.</p>	<ul style="list-style-type: none"> • Training and Deploy <ul style="list-style-type: none"> • Project management, resource management, demand management and project execution • Adopt <ul style="list-style-type: none"> • Post deploy adoption support and refinement, implementation review, dashboard review and closing implementation • Post Implementation review <ul style="list-style-type: none"> • Dashboard review, usage review, lessons learned, future planning and roadmap • Time Management <ul style="list-style-type: none"> • Summary level and task level tracking, scheduling resources, time entry and approval, reports and dashboard 	<p>July 2, 2017</p>	<p>Sept. 30, 2017</p>	<p>Lead by Yemi Ilesanmi / Rita Lazar-Tippe PM – Elis Valera, SA – Jon Manuel / Massie Kitagawa</p>
-----------	---	---------------------	-----------------------	--

Project Plan Summary: *Please summarize the monitoring including relevant information such as background, objectives, monitoring area, methods/monitoring design, assumptions, outcomes, and references. These should align with the information provided in Appendix 1: Annual Monitoring Schedule.*

Currently a significant amount of manual labour is being utilized to support the program, the intent is to streamline core capabilities within EMSD by; enabling efficiency, transparency and collaboration, in order to adhere to the mandatory audit tracking and reporting requirements (as per the Office of the Auditor General). In addition, ensuring proper fiscal management, planning and sustainability. The continued development of the processes, automation and the tool enablement will drive efficiency, cost effectiveness, enhanced resource management, automation and improve planning and delivery of the OSM program.

The project management system will also address the mandatory audit tracking and reporting requirements put in place by Office of Auditor General. The tool will enable EMSD to track and manage the overall health of projects through the various phases and activities; plan, deliver, track, manage and report on human resource time allocation, equipment allocation, financial status / impact, project progress, task and deliverable management, provide various levels of dashboards for the overall health of the projects.

The 2012-2015 JOSM Integrity review on page 4 outlined that no single document that regularly tracks progress towards achieving the larger goal of assessing the environmental impact of oils sand development currently exists.

With the implementation and process required to implement the project management system will help evolve the maturity and address the outlined concerns in the OSM integrity review in regards to a consolidated view and tracking of OSM projects.

Appendix 1 – Detailed Multi-Year Financial Breakdown: if changes are to be made then an Addendum must be Complete and Approved.

(Complete the following detailed financial breakdown; add or delete categories as required)

Budget requirements	Year 1 (201X- 201Y)		Year 2 (201X- 201Y)		Year 3 (201X- 201Y)		Year 4 (201X- 201Y)		Year 5 (201X- 201Y)	
	OSM Funding	External Funding	OSM Funding	External Funding	OSM Funding	External Funding	OSM Funding	External Funding	OSM Funding	External Funding
1) Salaries and benefits										
a) Lead (Non IT) (\$ 100 / hour)	6,500									
b) Project Manager (\$ 80 / hour)	14,000									
c) Trainer (\$ 50 / hour)	1,770									
d) Lead (IT) (\$ 100 / hour)	3,500									
e) Support Analyst (\$ 80 / hour)	8,400									
2) Operations and Maintenance										
a) Portfolio Management System is subscription based and therefore, fluctuates based on number of users. Based on the current license requirements the amount has been outlined as \$ 40,800 USD. With a conversion rate of \$1.35.	55,080		55,080 (may fluctuate based on OSM requirements)		55,080 (may fluctuate based on OSM requirements)		55,080 (may fluctuate based on OSM requirements)		55,080 (may fluctuate based on OSM requirements)	



3) Consumable Materials and supplies										
a) <i>(Describe Consumable Supply)</i>										
4) Travel										
a) Conferences and meetings <i>(identify conference/meeting)</i>										
b) Field work - travel										
c) Project-related travel										
5) External Contracts										
a) One time vendor setup and configuration \$ 25,000 USD USD, with a conversion rate of \$1.35.	33,750									
Grand Total	123,000		55,080 (may fluctuate based on OSM requirements)		55,080 (may fluctuate based on OSM requirements)		55,080 (may fluctuate based on OSM requirements)		55,080 (may fluctuate based on OSM requirements)	

Appendix 2 – Staffing Plan

(Complete the following detailed staffing plan; add or delete categories as required)

Responsible Role	Year 1 – Budget Allocation		Year 2 – Budget Allocation		Year 3 – Budget Allocation		Year 4 – Budget Allocation		Year 5 – Budget Allocation	
	OSM Funding	External Funding	OSM Funding	External Funding	OSM Funding	External Funding	OSM Funding	External Funding	OSM Funding	External Funding
Science Expertise										
Technical/Field Staff										
Administrative and Program Coordination										
Grand Total <i>(inserted into Appendix 2)</i>										\$

Appendix 3 - Approvals

Project Submitted by:		
Name: Rita Lazar-Tippe		
Organization: EMSD/AEP	Signature:	Date:
Project Approved by:		
Dr. Monique Dubé (AEP)		Dr. Kevin Cash (ECCC)
Signature		Signature
		
Date		Date