CSREES One Solution Initiative

Project Plan Workshop

May 9th - 17th, 2006

Agenda

Schedule	Topic
☐ *0:00 – 0:10*	*Introduction*
☐ *0:10 – 0:30*	*Overview of the One Solution Project Plan*
☐ *0:30 – 1:50*	*Project Plan Discussion: Milestones, Prioritization, and Interdependencies*
☐ *1:50 – 2:00*	*Next Steps*

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Welcome to the One Solution Project Plan Workshop, and thank you for your participation!

> **During today's session, we will be reviewing the One Solution Draft Project Plan, discussing its various milestones and timelines, and capturing your input. This will enable the development of a final Project Plan that is comprehensive and effective.**

The objectives of today's workshop are:

- Review a draft of the proposed project plan for One Solution and gain a better sense of the products and services that will provide the most value in the CSREES Information System (CIS).

- Gather input on how the CIS system should work from the best source – the people who will be using the system – YOU. Your input is needed to help us validate the milestones of the One Solution implementation and identify the associated risks, interdependencies, and priorities.

CSREES has developed a Business Case that describes the vision, goals, and benefits of One Solution.

Vision

One Solution is an integrated reporting strategy that ties together disparate reporting processes and systems, simplifies reporting for CSREES staff and partners, and improves the usefulness of reporting data.

Goals

- Simplify reporting and reduce burdens for funding recipients;

- Improve the quality of accountability data and better equip the Agency to meet increasing performance and budget reporting expectations; and

- Reduce staff effort required to complete reporting-related processes, allowing staff members to focus on program leadership and active, portfolio-based management.
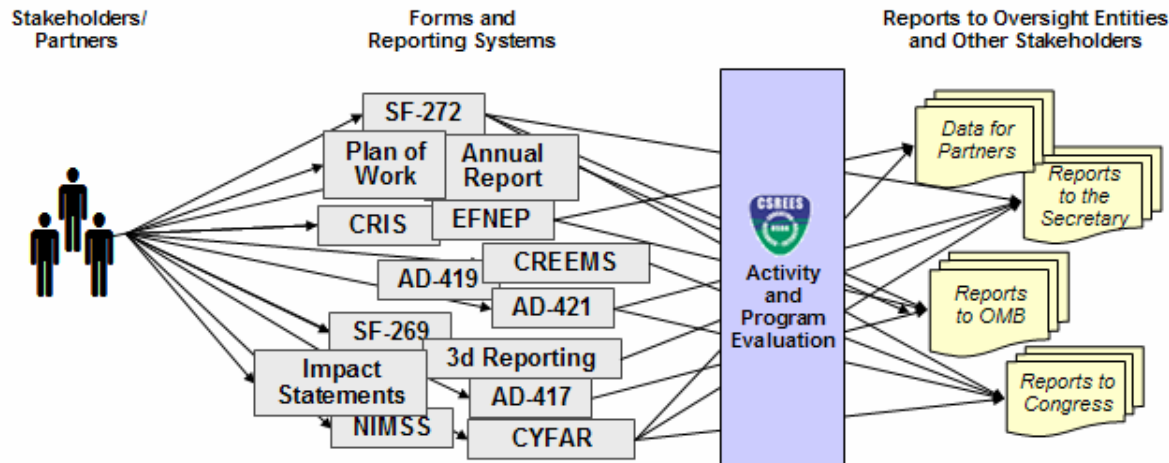
Benefits

- Standardized, streamlined, Agency-wide processes and systems;

- Single location for obtaining and generating information to manage programs;

- Capacity to create reports that integrate data from across all CSREES reporting and project management systems;

- Ability to collect data directly from partners through a web-based reporting 'storefront'; and

- Streamlined review processes through electronic routing, notification, and approval.
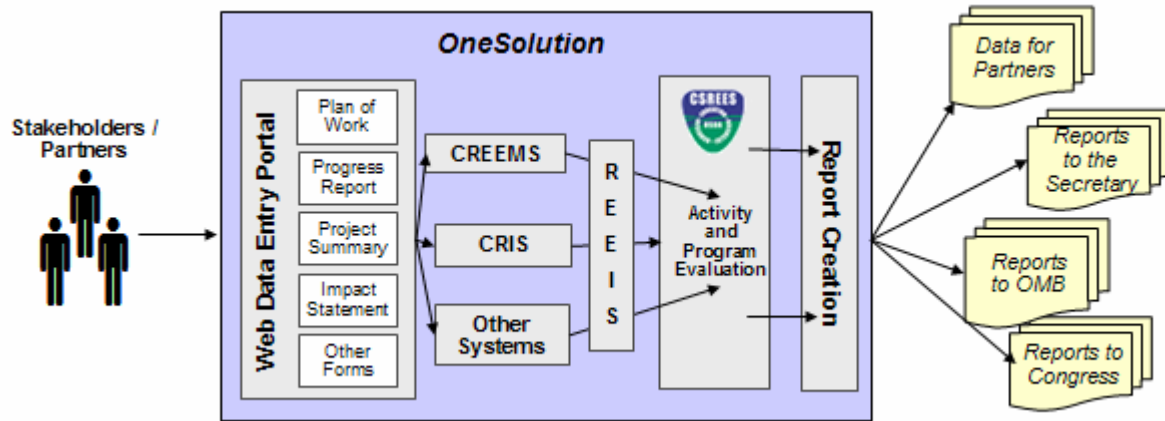
One Solution will restructure existing, uncoordinated systems into a more efficient arrangement that simplifies reporting processes.

Current Reporting Situation

Stakeholders/Partners — Forms and Reporting Systems — Reports to Oversight Entities and Other Stakeholders

SF-272, Plan of Work, Annual Report, CRIS, EFNEP, AD-419, CREEMS, AD-421, SF-269, Impact Statements, 3d Reporting, AD-417, NIMSS, CYFAR → Activity and Program Evaluation → Data for Partners, Reports to the Secretary, Reports to OMB, Reports to Congress

One Solution Vision

Stakeholders / Partners → Web Data Entry Portal (Plan of Work, Progress Report, Project Summary, Impact Statement, Other Forms) → CREEMS, CRIS, Other Systems → REEIS → Activity and Program Evaluation → Report Creation → Data for Partners, Reports to the Secretary, Reports to OMB, Reports to Congress — OneSolution

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The Project Plan takes the refined vision and goals detailed in the Business Case and defines a roadmap for the implementation of One Solution.

| Completed | In Progress | Future Work |
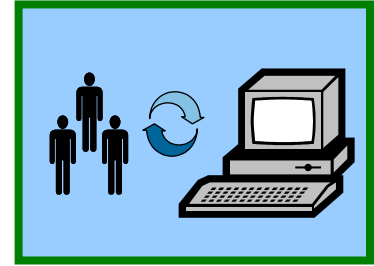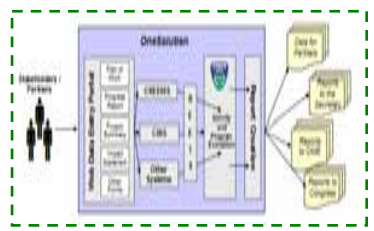
One Solution
Vision

One Solution
Business Case

*One Solution
Project Plan*

One Solution
Implementation
and Operations

The Project Plan, a vital part of the overall One Solution initiative, enables consistent long-range planning of implementation milestones that are aligned with the original vision. The goals of the Project Plan include:

- Define and map key processes;
- Develop key performance measures;
- Establish milestones and priorities;
- Develop action steps, assign responsibilities, and establish timelines;
- Define budget for the allocation of funds and resources according to priorities; and
- Provide a process for the continuous monitoring of risks and ongoing evaluation of the implementation's progress.

A Project Plan distills the various elements of an implementation into operable phases and activities.

- ➢ **Mission, Vision, Values, Goals, and Guiding Principles**

- ➢ **Major Milestones**

- ➢ **Workplans**

- ➢ **Staffing Plans**

- ➢ **Budgets**

- ➢ **Performance Metrics**

- ➢ **Risks and Associated Mitigation Strategies**

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One Solution Initiative

DRAFT Project Plan

April 21, 2006

Phase 1: Infrastructure, Plan of Work, and Standard Report

Phase 2: Repository Development and System Launch

Phase 3: Advanced Capabilities and External Integration

Communications

Program Management

Governance

System Operations

The phases and activities are then organized into a defined roadmap for implementation within the Project Plan.

FY2005	TBD

Phase 1:
Infrastructure, Plan of Work, and Standard Report

Phase 2:
Repository Development and System Launch
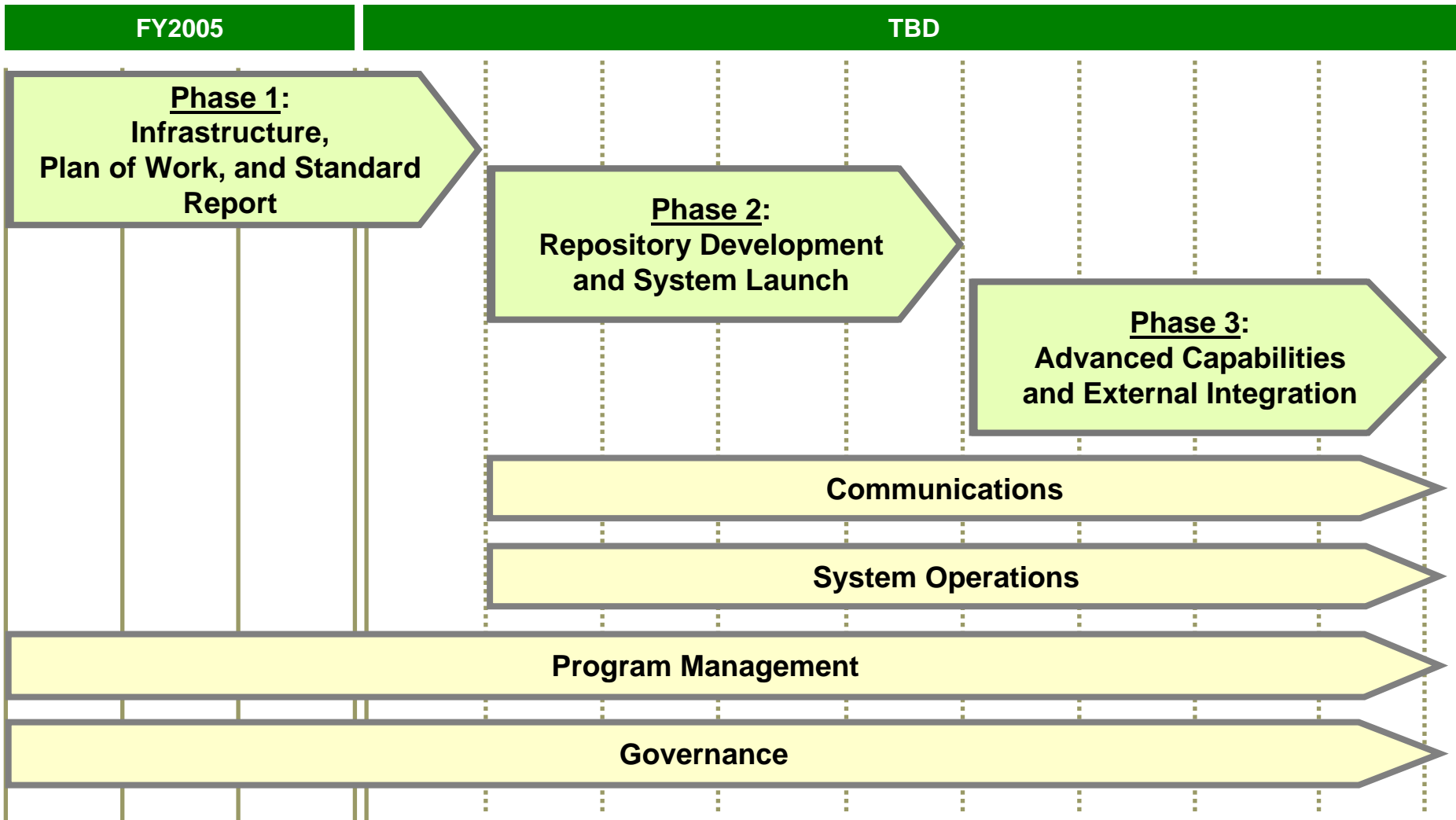
Phase 3:
Advanced Capabilities and External Integration

Communications

System Operations

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There are six general topic areas that we would like to discuss as we review the gameboards for each phase – reporting / data, workflow, prioritization, risks, communication, and training.

Reporting/Data

How can CIS improve the ways you are using reporting information/data?
One Solution's primary goals are to improve the quality of accountability data and reduce the burden of data collection and reporting for Agency staff and partners.

Workflow

How can CIS improve your productivity and workflow?
This includes any manual processes that CIS could replace or automate. Also, consider any redundancies associated with and across various units.

Prioritization

What milestones are the most critical to the success of One Solution?
In particular, please comment on the order of the milestones. Identify items that would bring the greatest business value or "quick wins" that could bring early successes to the effort.

Risks

What milestones carry the greatest degree of risk?
Identify the risk factors that could affect the implementation, such as interfaces with external systems, anticipated legislation, availability of resources, or stakeholder buy-in.

Communication

What are the characteristics of previous, successful communications at CSREES?
This includes any actions that could make communications more effective, as well as the timing, delivery vehicle, and the key stakeholders involved in the communications.
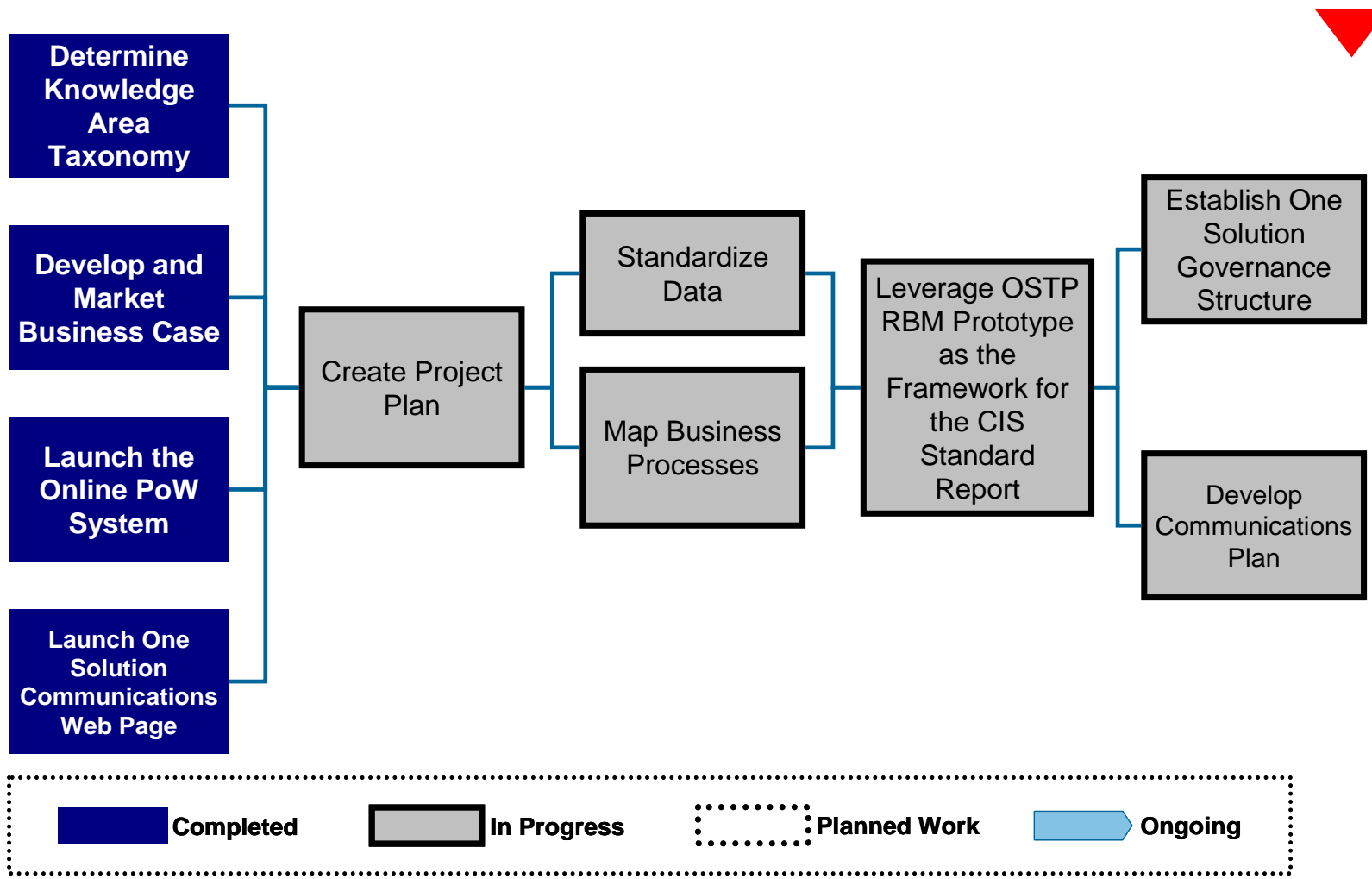
Training

What would be the most effective types of training for this initiative?
Identify the audiences that will need to be trained, when training should be scheduled, and the most appropriate training methods for each audience.

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The roadmap provided by the Project Plan is divided into gameboards with actionable milestones and activities; the first phase is in progress, and includes several completed milestones.

Target: Fall 2006

Completed	In Progress

- Determine Knowledge Area Taxonomy
- Develop and Market Business Case
- Launch the Online PoW System
- Launch One Solution Communications Web Page

Create Project Plan

- Standardize Data
- Map Business Processes

Leverage OSTP RBM Prototype as the Framework for the CIS Standard Report

- Establish One Solution Governance Structure
- Develop Communications Plan

Legend:
- Completed
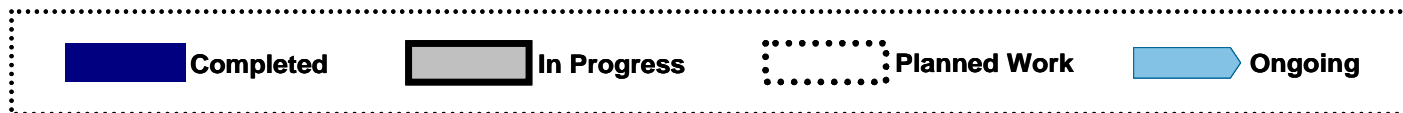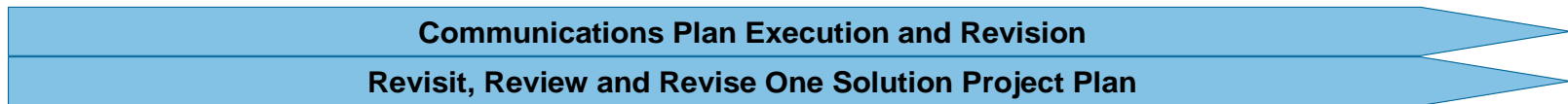- In Progress
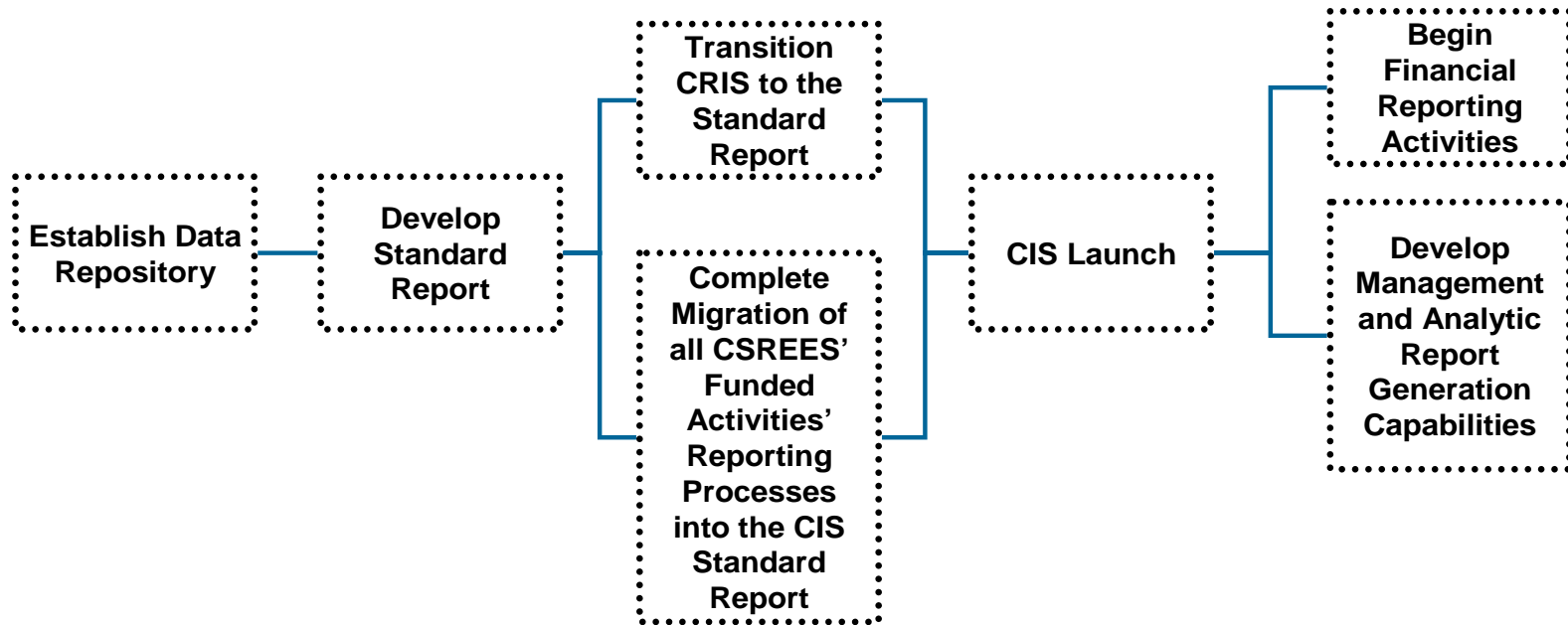- Planned Work
- Ongoing

CSREES

The next gameboard illustrates milestones and activities associated with the second phase – all of these milestones are planned work.

Update Project Plan

Target: TBD

Establish Data Repository	Develop Standard Report	Transition CRIS to the Standard Report		CIS Launch	Begin Financial Reporting Activities

Complete Migration of all CSREES' Funded Activities' Reporting Processes into the CIS Standard Report

Develop Management and Analytic Report Generation Capabilities

Communications Plan Execution and Revision

Revisit, Review and Revise One Solution Project Plan

Completed	In Progress	Planned Work	Ongoing

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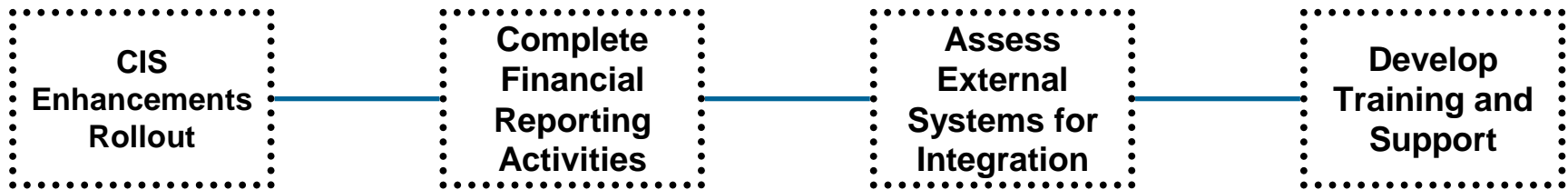Research, Education, and Extension Service

The last gameboard illustrates milestones and activities associated with the third phase – all of these milestones are planned work.

Update Project Plan

Target: TBD

| CIS Enhancements Rollout | Complete Financial Reporting Activities | Assess External Systems for Integration | Develop Training and Support |

Communications Plan Execution and Revision

Revisit, Review and Revise One Solution Project Plan

Completed   **In Progress**   **Planned Work**   **Ongoing**

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Specific to the Standard Program Report workshop, we would also like to discuss the following topic areas – the OSTP RBM, classification taxonomy, information retrieval and analytics, and 3(d) / Extension.

OSTP RBM

How can the OSTP RBM best be utilized in the development of the Standard Report?
The OSTP RBM will provide the basis for the development of an Agency Standard Report to assist with the standardization of data collection processes.

Classification Taxonomy

Does the current Knowledge Area taxonomy sufficiently support analysis?
Additional taxonomies may be necessary if the current Knowledge Area taxonomy is not sufficient.

Information Retrieval and Analytics

What information do you need for ongoing management reporting and analytics?
Varieties of data and status updates can be queried and provided in the form of a "management dashboard" to support ongoing management activities. In addition, it will be useful to clarify what types of searching capabilities would be required to support such management activities.

3(d) / Extension

How can we expedite the inclusion of 3(d) / Extension into One Solution?
Data standardization issues will need to be resolved in the development of the standard report.

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Specific to the <u>Financial Collections and Use</u> workshop, we would also like to discuss the following topic areas – duplicative collections, outcomes / funding management, efficiencies, and explanatory notes.

Outcomes / Funding Alignment	***How can outcomes / impacts and funding best be aligned within the One Solution initiative?*** One Solution will assist CSREES in complying with the Federal government's new emphasis on linking project outcomes / impacts to project funding.

Duplicative Collections	***What financial collections can be consolidated during the first roll-out of CIS?*** Some financial data collections are duplicative with collections incorporated into other reports.

Efficiencies	***What aspects of the financial collections process can be incorporated dynamically into CIS?*** One Solution will reduce the burden of collecting financial data for both CSREES staff and land-grant partners.

Explanatory Notes	***How can the Explanatory Notes be automatically generated through CIS?*** CIS will strive to reduce the burden of creating Explanatory Notes for the budget staff.

Specific to the <u>Awards / Program Management</u> workshop, we would also like to discuss the following topic areas – integrating NRI / SBIR, internal workflow, PoW reporting, and other data collections.

NRI / SBIR	*How can the National Research Initiative's and Small Business Innovation Programs' tracking systems best be incorporated into CIS?* One Solution will seek to incorporate programs and their systems from across CSREES.

Internal Workflow	*What tools would staff like to have to track grant awards through the full grant lifecycle process?* CIS can provide the capability for NPLs and other business owners to receive ongoing status updates regarding program and financial reports from land-grant university partners throughout the full grant lifecycle process.

PoW Reporting	*How do we associate data across C-REEMS, CRIS, and Plan of Work reports?* The pre-population of data by associating elements across various systems will simplify the collection processes.

Other Collections	*How can external systems best be associated with the REEIS data repository?* Information from other systems such as ES 237, EFNEP, and PPRS may be incorporated into the data repository.

Specific to the <u>Budget Performance Integration</u>, we would also like to discuss the following topic areas – portfolio reviews / PART, logic model alignment, internal workflow, and classification taxonomy.

Portfolio Reviews / PART	***How can CIS be used to serve portfolio reviews and Program Assessment Rating Tool reporting?*** CIS can provide tools to assist with the portfolio reviews and Program Assessment Rating Tool processes.
Logic Model Alignment	***How can CIS include all of the categories of the logic model?*** The logic model will be incorporated into standard reporting processes through One Solution.
Internal Workflow	***What tools would staff like to have to track grant awards through the full grant lifecycle process?*** CIS can provide the capability for NPLs and other business owners to receive ongoing status updates regarding program and financial reports from land-grant university partners throughout the full grant lifecycle process.
Classification Taxonomy	***Does the current Knowledge Area taxonomy sufficiently support analysis?*** Additional taxonomies may be necessary if the current Knowledge Area taxonomy is not sufficient.

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Specific to the <u>Budget Development</u> workshop, we would also like to discuss the following topic areas – tables for explanatory notes, automating cross-cuts, and information retrieval and analytics.

Tables for Explanatory Notes	*How can the Explanatory Notes be automatically be generated through CIS?* CIS will strive to reduce the burden of creating Explanatory Notes for the budget staff.
Automating Cross-Cuts	*What tools could CIS provide to assist with common budget cross-cuts?* CIS and the data repository will assist the budget staff by providing the ability to make dynamic cross-cuts of budgetary and financial data.
Information Retrieval and Analytics	*What information do you need for ongoing management reporting and analytics?* Varieties of data and status updates can be queried and provided in the form of a "management dashboard" to support ongoing management activities. In addition, it will be useful to clarify what types of searching capabilities would be required to support such management activities.

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Specific to the <u>Quality Assurance</u> workshop, we would also like to discuss the following topic areas – NPL / partner roles, research / education / extension, automated notification, and report guidance.

NPL / Partner Roles	*What roles can NPLs and partners have in quality assurance?* One of One Solution's primary goals is to improve the quality of accountability data.

Research / Education / Extension	*How can quality assurance practices be incorporated into Research, Education, and Extension activities?* The One Solution initiative will utilize standard processes and procedures to promote quality assurance throughout the review and approval processes.

Automated Notification	*What tools would staff like to have to track grant awards through the full grant lifecycle process?* CIS can provide the capability for NPLs and other business owners to receive ongoing status updates regarding program and financial reports from land-grant university partners throughout the full grant lifecycle process.

Report Guidance	*What guidance can be provided to CSREES staff and partners to securely manage the data collection process?* Standard practices that enable the secure operation of CIS will be developed to provide quality assurance at each stage of the review and approval processes.

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Specific to the <u>Policy Issues</u> workshop, we would also like to discuss the following topic areas – RFA development, terms and conditions, collections, communications, legislative, and administrative manuals.

RFA Development	*How can CIS be incorporated into newly written Requests for Application?* The Request for Application is an opportunity to incorporate One Solution.
Terms and Conditions	*How can CIS track compliance with various terms and conditions?* Dynamic tools can be built into CIS to assist with the tracking of each partners' compliance with their respective terms and conditions.
Other Collections	*How can external systems best be associated with the REEIS data repository?* Information from other systems such as ES 237, EFNEP, and PPRS may be incorporated into the data repository.
Communications	*What are the most effective communication vehicles for CSREES staff / partners?* Communication will play a key role throughout each phase of the One Solution implementation. By selecting the appropriate communication vehicles, key messages can be delivered in a timely, effective manner.
Legislative	*What existing and pending regulatory and legislative drivers could affect the implementation?* New Executive or Congressional mandates could have an impact on the implementation.
Administrative Manuals	*In what ways will administrative manuals need to be updated to govern One Solution?* The implementation of One Solution will result in changes to business processes that will need to be documented through updates to existing administrative manuals.

Specific to the <u>Technical Aspects</u> workshop, we would also like to discuss the following topic areas – data standards, Web-based entry, data pre-population, automated crosscuts, and internal workflow.

Data Standards	***What governance and processes are necessary to apply data standards across One Solution?*** In order to develop a data repository, data sets from multiple systems will be need to be made consistent.
Web-Based Entry	***What are the characteristics of the ideal One Solution "storefront"?*** The vision for One Solution includes a single, Web-based entry report for all data and report submissions.
Data Pre-Population	***What opportunities for data pre-population through electronic submission can be implemented into CIS throughout the awards lifecycle?*** Many data collections are duplicative across multiple reports – leveraging this data to pre-populate collections can reduce the burden of reporting.
Automated Cross-Cuts	***How complex are automated budget cross-cuts?*** CIS and the data repository will assist the budget staff by providing the ability to make dynamic cross-cuts of budgetary and financial data.
Internal Workflow	***What tools would staff like to have to track grant awards through the full grant lifecycle process?*** CIS can provide the capability for NPLs and other business owners to receive ongoing status updates regarding program and financial reports from land-grant university partners throughout the full grant lifecycle process.

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In preparation for upcoming developments in the One Solution initiative, team members are asked to review the Business Case and Project Plan, and forward any comments or feedback to Greg Crosby by Friday June 9th, 2006.

Step #1:
Revisit the Business Case

The One Solution Business Case provides in-depth context regarding the vision, mission, and goals of the initiative. By revisiting the Business Case, you'll be able to gain a clearer understanding of the initiative as a whole.

Step #2:
Review the Project Plan

The One Solution Project Plan will be completed on June 23rd, but a draft version is currently available on the One Solution Web site. Please review this draft document to familiarize yourself with the milestones for implementation. The draft Project Plan can be found on the One Solution Communications Web Page: **http://www.csrees.usda.gov/onesolution**

Step #3:
Provide Feedback

After reviewing the draft Project Plan for One Solution, please provide any additional feedback that you have, beyond what was expressed today, to Greg Crosby by Friday June 9th, 2006.

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Closing Remarks

Thank you for your participation in the One Solution Project Plan Workshop!

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