Annual Planning Workshop
Login Procedures

- Login to PC as yourself:
  - Username = IAM login
  - Password = enter your password

- Run the Default Registry (Clarity Open Workbench)
  - K:\InfoTech\Internal Services\PMO\PM\Clarity\Claritydefaults-win7.reg

- Login into Clarity Production

Annual Planning Workshop
Agenda

- Cross Division Sizing Meetings

- Reengineered Plans

- Supervisor Planning Packets

- Review New Project Plan Files

- PMO Handbook – Section 11 Master Planning

- Second-Year Team Plans

- Annual Planning Timeline

- Questions

Cross Division Sizing Meetings

Application Teams present to TSN

- Share an overview of the project (either from the attached spreadsheet or the SharePoint site or the Project S&A)
- Review the project goal
- Use the Technical Systems Labor Estimates for Project Sizings (click here)
- Discuss with the TSN teams which roles will be needed for each project
- and any further discussion if needed

TSN presents to Apps, IS and CLEMIS

- Review of the approved projects that the TSN / EA and SEP teams will be sizing for the 2023-2024 Master Plan. As part of this process, estimates will be obtained from the other teams throughout the department that will participate or be impacted (Apps, IS and CLEMIS).
- If available, this meeting will also provide information about TSN / EA / SEP Planned Maintenance & Upgrade plans, so the team can discuss when it's a larger Application Services / IS / CLEMIS impact than the traditional patching.
- The goal is to help evaluate **impact** of projects so we can plan better in Apps / IS / CLEMIS.
- Because we are very early in the request to size process, these meetings may be a collaborative discussion with the goal to try and identify whether the other teams have a role in each project – this may require follow up afterward with the appropriate Supervisor or PM.

Annual Planning Workshop
Reengineered Plan Files

- 2021-22 Plans Reengineered
  - Non-Project
  - Team Management
  - Customer Support
  - System Maintenance

- 2020-22 Planned Maintenance & Upgrades

Note: Total Usage (ETC + Actuals) through 04/01/22

  Approximately 6 months through the plan year

Annual Planning Workshop
Supervisor Planning Packets

- Current Plans

  - Online Packets Prepared
    - Clarity Project – DH1010QC Quarterly Mgmt Review Collaboration
    - Collaboration Folder – Annual Supervisor Planning Packets/2022

- Clarity Open Workbench Views

  - Actuals/Estimates to prep New Plans
  - Tasks, ETC and Actuals through 04/01/22
  - Approximately 6 months through plan year

Annual Planning Workshop
Review New Project Plan Files

- 2022-23 Team and Non-Project Plans
  - Populated with tasks from 2021-22 Team
  - ETC = Current Year Total Usage (ETC + Actuals) through 04/01/22
  - Importance of Estimating the Annual Work Effort
    - Only plan for hours required to complete the effort
    - Do not estimate based on number of resources
    - Did COVID contribute to lower/higher support numbers
  - Only remove inactive resources from the project once the ETC = 0
  - Only add Roles for vacant positions approved to fill
    - Be accurate with the Roles you assign
    - Assign Team OBS for Roles

Annual Planning Workshop
Allocations

- ***Default Allocation Percent*** will be identical to last year's plan. Adjust so that ***Allocation Hours*** are approximately equal to ***Total Usage.***
  - FTE - Total Usage / 1743 hours (249 business days * 7 hours/day) = DA%
  - Contractor - Total Usage / 1992 (249 business days * 8 hours/day) = DA%

- Remove all Resources with 0 ETC.

- ***Allocation Segments*** can be set for cyclical work.

- Resources from your team will be hard-booked on 7/28/22.

Annual Planning Workshop PMO
Handbook

- ## Section 11 – Master Planning

  - Annual Team and Non-Project Planning
  - Team Plans
  - Loading Pattern – Uniform vs. Fixed
  - Average Trends Across Department
  - Implementation Schedule

- ## Section 2 – Project Planning

  - Project Time Calculation – Page 2.22 (validate every 2 years; may change)

- ## Appendix G – Definitions

Annual Planning Workshop
Second-Year Team Plans

- Once plans are Baselined PMO will create 2023-24 Team Plans
  - No detailed tasks, no specific resources
  - One task with ETC summed up by Role
  - ETC will be identical to the 22-23 ETC
  - ETC will be adjusted when 22-23 plans are rebaselined in September
  - Next year the tasks in the 23-24 projects will be reengineered as usual

- Why are we doing this?
  - So PMO can use Clarity's functionality to better plan the Role demand for the 2023-2024 Master Plan
  - So Supervisors can better plan long-range Role demand for their Teams

Annual Planning Workshop
Annual Planning Timeline

- April 8   Packets Distributed

- June 24   Plans Completed

- July 11 & 12   Management Review

- July 22   Final Changes to Plans

- July 28   Plans Baselined

- September 29   Plans Re-Baselined

- October 1   Time Tracking Begins

![Oakland County Michigan Information Technology logo]

Annual Planning Workshop
Questions

Time Tracking for this Workshop

* FTE – Training Task

* Contractors – Tracking & Control in Team Mgt Plan

Additional Questions

Time allowed to work on your plan files