



**Statewide Voter Registration System
(VoteCal) Project
California Secretary of State**

Schedule Management Process Summary

FINAL v2.0

August 3, 2012

1 Introduction

The purpose of this document is to provide Bidders intending to respond to the October 29, 2010 Statewide Voter Registration System (VoteCal) Project Request for Proposal (RFP) with general information regarding the California Secretary of State (SOS) VoteCal Project Schedule Management process. This process will use a Consolidated Project Schedule (CPS) that is owned and maintained by the SOS VoteCal Project Management Office (PMO). The CPS aggregates key planning and tracking data, along with interdependencies, from multiple team-specific schedules. These individual team schedules include, but are not necessarily limited to:

- System Integration Contractor's (SI's) Integrated Project Schedule (IPS)
- The Secretary of State's (SOS) schedule
- Electronic Management System (EMS) vendors' schedules

All data in the consolidated schedule will be derived directly from the individual team schedules and updated as part of the cyclical schedule management process.

This document is not a replacement for the schedule-related requirements specified in the RFP. It is intended as an example of the general structure of the CPS and provides more information about SOS' planned schedule management approach for the VoteCal Project.

2 Assumptions and Constraints

- System Integrator, Election Management System vendors (EMS's), SOS , IV&V will each maintain a standalone MS Project team-specific schedule.
- Each team-specific schedule will have Flag 4 that, when set to "Yes," will indicate the subset of activities that will be manually synched with the CPS every two weeks.
- Most tasks in the CPS will correspond to tasks that are maintained in team-specific schedules.
- SOS VoteCal Project Manager(s) will generate project-level metrics and reports from the CPS; any schedule quality analyses or reports based on team-specific schedules will be the responsibility of team schedule owners.
- All VoteCal schedules (the CPS and team-specific schedules) will use a standard calendar with added State Holidays.

3 Data Relationships between Schedules

During the schedule management process, the VoteCal PMO must be able to easily extract data from the individual team schedules and update the CPS. This will be accomplished by having tasks that are common to a team schedule and the CPS; such tasks are termed "touch point" tasks. Having such correspondences between team schedules and the CPS will enable the VoteCal PMO to, in a straightforward fashion, extract status updates from team schedules and update the CPS to reflect all teams' status information.

The specific tasks that will serve as touch point tasks will be selected by the VoteCal PMO, based on the individual team schedule content, the team's specific deliverables and complexity thereof, consideration of SOS executive reporting requirements, and discussion with the schedule manager for the team schedule.

4 Standard Work Breakdown Structure (WBS)

For touch point tasks to represent the same information in CPS and the team schedules, each must conform to a standard hierarchy. Therefore, the phases, deliverables and work products in all VoteCal team schedules will follow a uniform work breakdown structure (WBS). In addition, each touch point task in a team schedule will be identified in MS Project by means of setting MS Project Flag 4 to Yes. The standardized WBS in conjunction with the use of flag settings will allow the SOS VoteCal PMO to filter team schedules in order to locate the team schedule touch point tasks that correspond to each touch point task in the CPS.

The expected standard WBS hierarchy for all VoteCal schedules is provided below. Each schedule will be required to be aligned and configured in the same manner to enable valid comparison of schedule data and metrics.

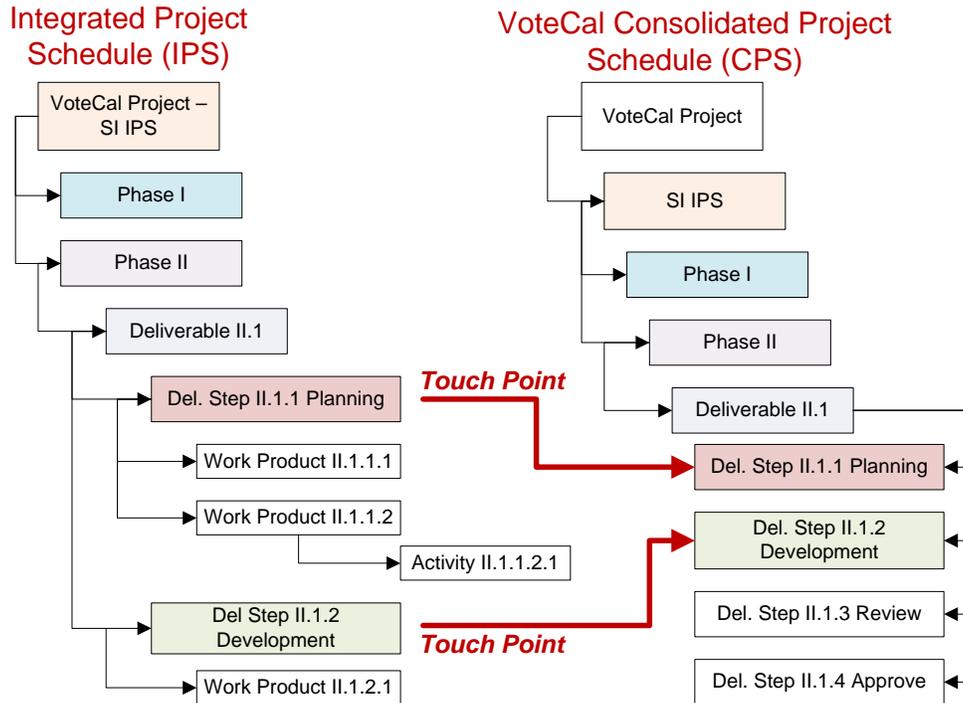
VoteCal Work Breakdown Structure (WBS):

- 0 **Project** – VoteCal Project level summary task
- 1 **Phase**– corresponds to a VoteCal Phase as defined in the VoteCal RFP
- 1.1 **Deliverable** – typically corresponds to a Deliverable that is specified in the team's contract
- 1.1.1 **Deliverable Step** – one of a series of to-be-defined steps that will describe the planning, development, review, and approval of a Deliverable
- 1.1.1.1 **Work Product** (as necessary) – a smaller output of a Deliverable Step, such a use case or a document
- 1.1.1.1.n **Activity** (as necessary) – a discrete component of work required to complete a Work Product, such as use case draft preparation or document review.

At a minimum, the tasks that are selected as touch point tasks in a team schedule (and therefore the touch point tasks in the CPS schedule data for that team) will include every Deliverable Step level task in the team schedule. For many deliverables, additional lower-level tasks in the team schedule may be designated as touch points. Whether and which additional specific tasks will be designated as touch point tasks will depend on the nature, quantity, complexity and duration of activities required to complete the deliverable.

The diagram below illustrates touch points between the SI's IPS and the CPS for Deliverable II.1 at the Deliverable Step level. The IPS Deliverable Step tasks are reflected as CPS detail tasks. This is a hypothetical example showing a minimum set of touch point tasks for a deliverable. As stated above, there will be cases where tasks at the Work Product level, or both the Work Product and Activity levels, will also serve as touch point tasks.

Example CPS-IPS Touch Points



5 Schedule Update Process

The following is a preliminary description of the anticipated bi-weekly schedule update cycle:

1. Each schedule owner (one per team) applies updates and conducts schedule analysis before submitting an updated team schedule to the SOS VoteCal PMO.
2. The schedule should be saved in a "CPS Update View" which filters tasks where Flag 4 equals Yes and at a minimum displays the following columns; ID, Name, Duration, Actual Duration, Remaining Duration, Start, Actual Start, Finish, Actual Finish, Forecast Completion Date (Custom Text Field 10)
3. SOS VoteCal PMO uses the team schedule data submitted by team schedule owners to update the CPS for all predefined touch point tasks.
4. SOS VoteCal PMO performs schedule analysis and works with SI Contractor, EMS vendors and/or SOS to review any schedule anomalies and fix any errors in reported data.
5. Schedule status and performance reports are generated from the updated CPS by the SOS VoteCal PMO.
6. If required, new touch point tasks are identified and all affected schedules are respectively modified in preparation for step 1 in the update cycle.