

Changing how projects are managed while maintaining traditional protocols: An Integrated Approach to Managing and Tracking CESI Project Information.



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Overview

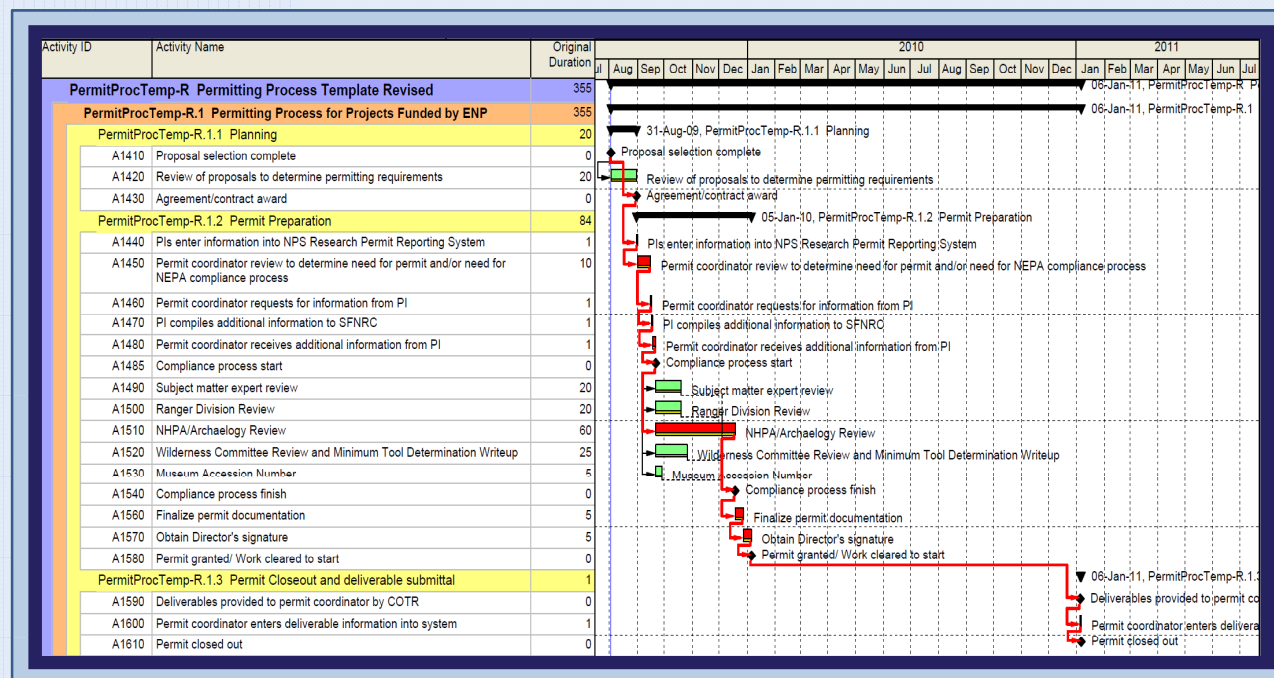
Since its inception in 1997, the Critical Ecosystem Studies Initiative (CESI) has been the primary investment by the U.S. Department of Interior to provide scientific information to advise restoration decision-making and to guide its own land management responsibilities for South Florida ecosystem restoration.

The CESI program has distributed over \$80 million in science funds across 300+ projects. The initial budget to start the program was \$12 million a year. Since FY02, the CESI budget has been stable at \$3.8 million a year. CESI funds are divided between four science program areas (Basic Research, Long-term Monitoring, Simulation Modeling, and Assessments), program administration, science planning, and interagency coordination.

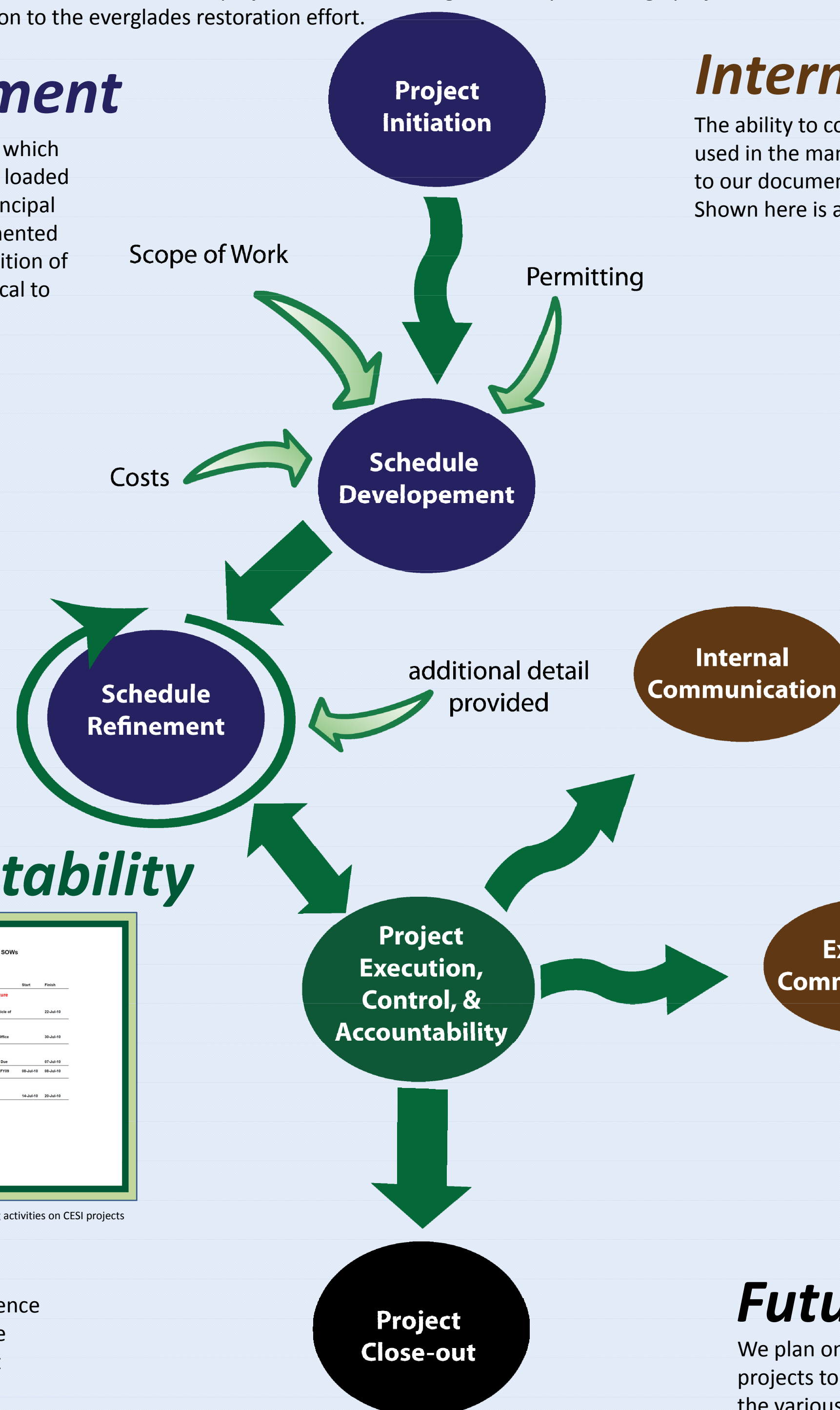
Long standing administrative protocols have been in place for the management of CESI projects at Everglades National Park. Utilizing new methods supported by specialized commercial software applications, these traditional, and often disjunct, protocols are being integrated into a comprehensive system which will serve as a single point of access for the administration of projects thus, enhancing our ability to manage project related information. Presented here is an overview of the approach and tools being used at the South Florida Natural Resources Center to create a more holistic utility with broader application to the everglades restoration effort.

Initiation & Schedule Development

Once a project has been approved for funding the data from the Scope of Work (SOW), which previously resided only with the Contracting Officer Technical Representative (COTR), is loaded into Primavera (P6) and, from the milestones, deliverables, and costs defined by the principal investigator, a draft schedule is developed, reviewed by the COTR and, if needed, augmented with additional details. Concurrently, a template of activities associated with the acquisition of a permit is built into the schedule so as to capture, as best as possible, all activities critical to the initiation of the project.

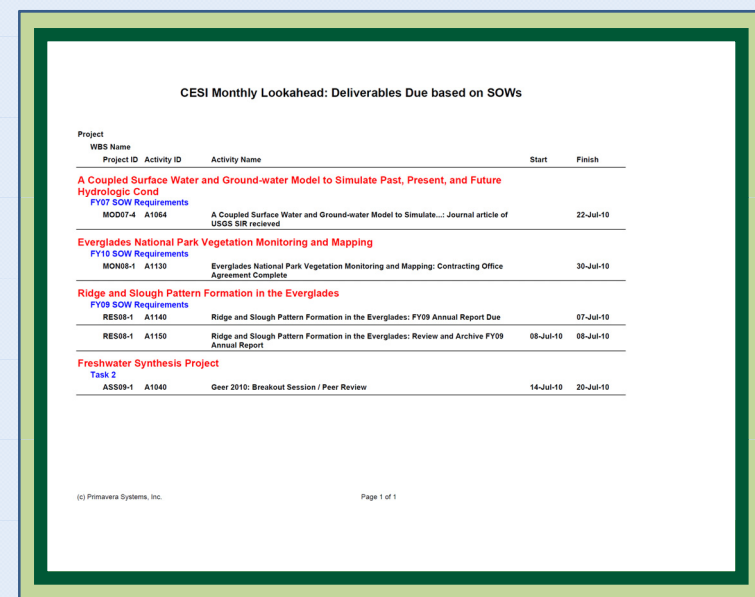


Presented here is an example of the permitting activities associated with projects conducted at Everglades National Park. Depending on the scope of the project this template can be modified to conform to the specific type of project being conducted. The end date for the permit closeout and deliverable submittal will be determined by the specific of the project.



Execution & Control, & Accountability

With an accurate project start date determined the project can be executed. On a monthly basis, custom “look-ahead” reports are produced for individual COTRs and the center management team. These reports show upcoming activities for all CESI projects currently in progress at the center. Managers can use these reports to determine if a given project is meeting what was agreed to in the SOW and if corrective action and/or refinement of the schedule is needed.



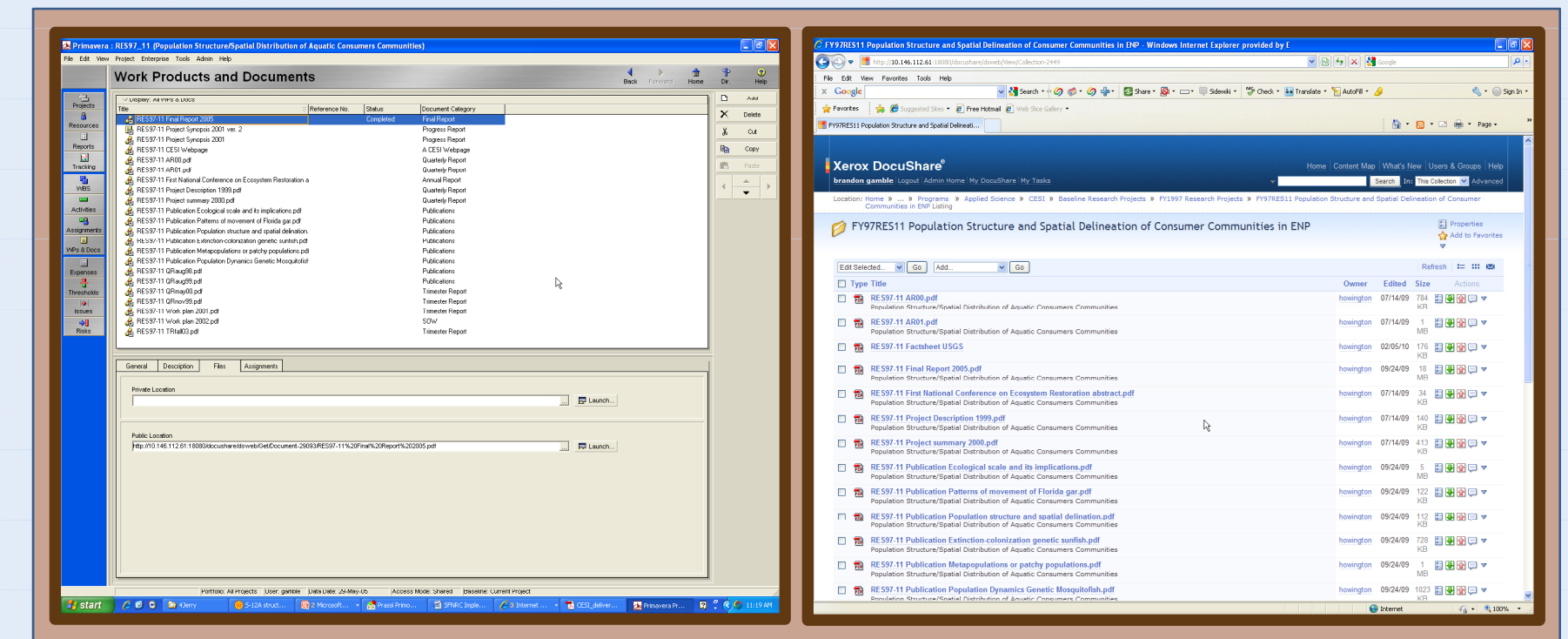
Example of a look-ahead report for upcoming activities on CESI projects

Close-out

The close-out of a project is a critical part of the project management process in that it marks the project's completion and allows for a final assessment of the projects adherence to the agreed upon scope of work. This is also the phase where final work products are tagged with metadata and the deliverables are archived in our document management system.

Internal & External Communication

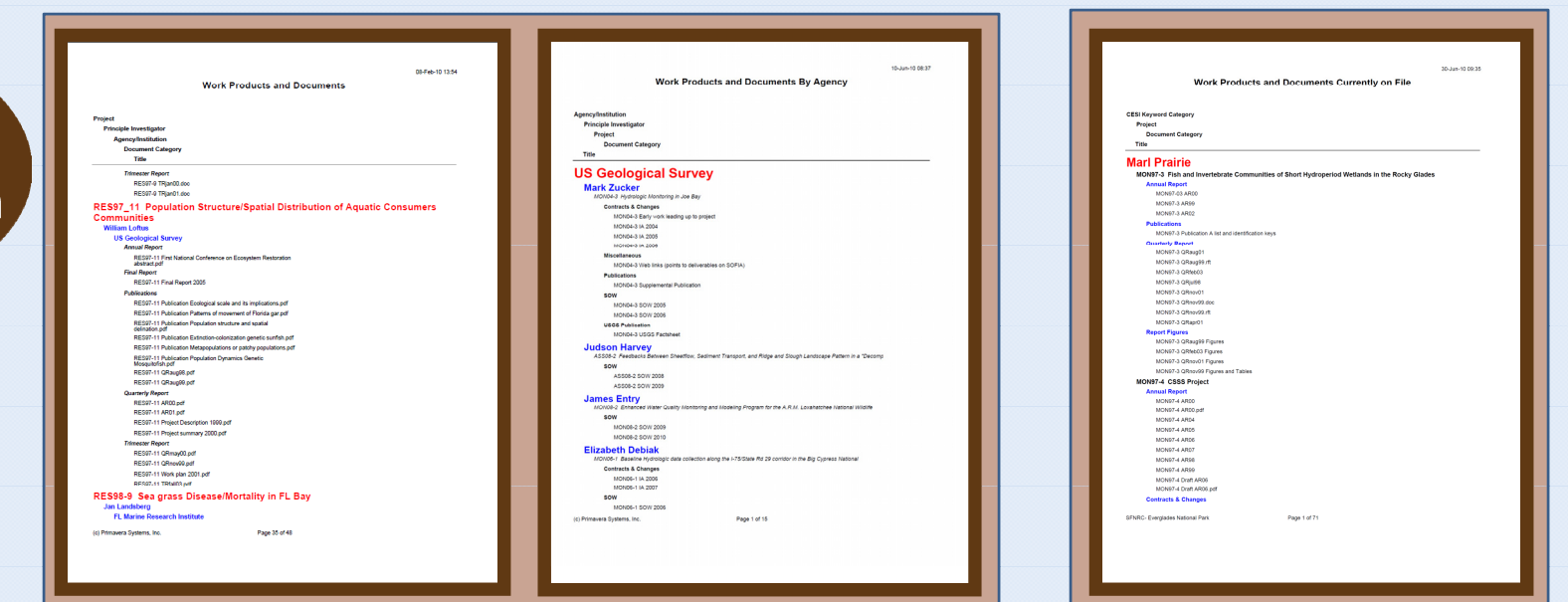
The ability to communicate internal to the organization is greatly enhanced through the integration of tools used in the management of projects. By loading all deliverables within a project and linking said deliverables to our document management system information is able to be disseminated beyond those who just use P6. Shown here is an example of how P6 is used in conjunction with our document management application.



Depicted here is a screen shot of the work products and documents which are linked to specific activities within the project schedule. Important to notice is the URL in the lower part of the screen. This URL links to our document management system which is accessible by staff.

This is what the user sees within our document management system. The reports here are identical to those depicted to the left. This system is accessible by all staff and additional metadata is tagged to the deliverable thus enhancing the search function of the system.

One of the main objectives in efficiently managing projects is to ensure that data coming out of projects is communicated to those working on the everglades restoration effort. The reporting function built into P6 allows us to use hundreds of different codes associated with each project to create reports which can be displayed in a variety of ways. Below are just a few examples of how the data can be parsed from the database and shared with managers and scientists.



Each project has metadata associated with it allowing for reports to be generated which show an increasing or decreasing level of detail. These types of reports provide a summary of work done by individual project, institution, or agency.

We have coded each project to correspond to particular habitat types. Output such as this could prove very useful when conducting literature searches for a particular restoration project.

Future Plans

We plan on continually refining the processes described here and to expand the use beyond CESI projects to all projects conducted at the SFNRC. It is also our goal to automate the linkages between the various data sources so that updating becomes as seamless as possible.