

WBS 2.6.3 Project Management, Reporting & Risk Management (PM&R)

Mission Statement

Project Management, Reporting & Risk Management (PM&R) enables an effective virtual organization through application of project management principles, provides visibility to project progress, successes, and challenges, brings new ideas and management practices into the project and disseminates lessons learned in XSEDE to other virtual organizations.

KPIs and Metrics

KPIs (L2)	Target
Variance, in days, between relevant report submission and due date	0
Grand (aggregate) mean of Staff Climate Study satisfaction items regarding content and accessibility of the XSEDE Staff Wiki (1-5 point Likert scale)	3.5 of 5

Other Metrics	Target
Percentage of risks reviewed	100%

Team Members

Name	Institution	Position
Marques Bland	Texas Advanced Computing Center (TACC)	PM for Extended Collaborative Support Services (ECSS)
Leslie Froeschl	National Center for Supercomputing Applications (NCSA)	Group manager, PM for Program Office (PgO)
Lucille Jarzynka	Pittsburgh Supercomputing Center (PSC)	PM for XSEDE Cyberinfrastructure Integration (XCI)
Noni Ledford	National Center for Supercomputing Applications (NCSA)	PM
Leslie Morsek	San Diego Supercomputer Center (SDSC)	PM for Community Engagement and Enrichment (CEE)
Sonia Nayak	San Diego Supercomputer Center (SDSC)	PM for Resource Allocation Service (RAS)
Deb Nigra	Pittsburgh Supercomputing Center (PSC)	PM
Scott Wells	National Institute for Computational Sciences (NICS)	Deputy manager, PM for Operations (Ops)

Communication & Meetings

The PM&R group meets bi-weekly on Monday at 2pm ET.

[Access PM meeting coordinates and notes.](#)

WBS 2.6.3 - PM&R Google Drive: <https://drive.google.com/drive/u/2/folders/0B16f9Te7wFwma2l4a1pacU0wTm8>

New Staff Orientation

- Expectations:
 - Participate in the activities and communications of the project management team
 - Serve as the primary PM for PM&R and/or XSEDE-wide project initiatives, as assigned
 - Document SOP for general project management procedures of XSEDE
 - Coordinate communications in the form of teleconferences, quarterly meetings, project-wide meetings, and reporting
 - Maintain PM&R processes, tools, and resources, including but not limited to:
 - XSEDE Staff Wiki
 - Change Control
 - Project mail lists
 - Risk Register
 - Metrics Dashboard
 - Finance Portal

- JIRA
- Attend scheduled PM&R team calls
- Suggest process improvement project, as appropriate

Projects

- **Internal Communication Management** (Lead: Leslie Froeschl)
 - In general, the highly distributed nature of XSEDE requires that project staff communicate frequently and thoroughly in order to provide the appropriate deliverables and to recognize opportunities and risks early. As a result, XSEDE relies heavily upon tools such as Zoom and internal mailing lists for WBS and project-wide communication. Enabling open dialog promotes awareness of current activities and future plans and facilitates consensus building by including XSEDE personnel as well as NSF and Advisory Committee Chairs. There is extensive communications vertically and horizontally across the organization.
- **Google Drive** (Lead: Deb Nigra)
- **Project Improvement Fund** (Lead: Ron Payne)
- **Key Performance Indicators** (Lead: Scott Wells)
 - Key Performance Indicators or KPIs are a class of metrics used at the L2 or Project-level to measure progress toward the project's strategic goals. There is at least one KPI per strategic sub-goal.
- **Project Change Control** (Lead: Scott Wells)
 - The change control process allows for documentation of project changes that affect technical, schedule, cost/budget, staff, project-wide key performance indicators, area metrics, scope, and/or other baseline changes. Any XSEDE staff member may submit a request to modify the execution of the project, which requires the completion of a Project Change Request (PCR). The PCR form is located on the Project Change Control wiki page linked to above.
- **Schedule and Instructions for Project Reports and Annual Program Plans** (Lead: Noni Ledford)
 - Interim reports, an Annual Report, and other ad-hoc reports are required for the XSEDE project by NSF. The reporting process provides a schedule, a report template, and detailed instructions for each step of the reporting process.
- **Risk Management** (Lead: Sonia Nayak)
 - Risk Management is key to the success of XSEDE. By identifying risks, their triggers, mitigation strategy and contingency plans, XSEDE can reduce the risk and keep moving forward. Before each quarterly meeting, risk owners will be asked to review their risks, providing any updates and adding any new risks that may have appeared. A risk Report/review may be given at the quarterly meetings.
- **Planning** (Lead: Noni Ledford)
 - Annually, XSEDE must plan for the activities to be executed in the next plan year. Program Planning provides a schedule of the planning activities, templates for each of the deliverables, and detailed directions for what to do in each step of the process.
- **Staff Onboarding/Offboarding** (Lead: Scott Wells)
 - As new staff members arrive and existing staff depart, access to the staff Wiki and other resources requires some degree of coordination. The process for adding access for new staff and removing access for exiting staff is initiated by the completion of Google forms. Completion of onboarding/offboarding forms is not meant to address staff who flow in and out during the project year, but rather permanent departure from XSEDE. Temporary resource addition or removal should be handled individually.
- **Quarterly Meeting Actions/Decision Management** (Lead: Sonia Nayak)
 - Four times a year, XSEDE management staff gather and meet for two days. These meetings consist of multiple presentations and discussions. A product of these presentations and discussions is often action items and decision making. These are logged and tracked by XSEDE staff using JIRA.
- **Project Execution Plan Maintenance** (Lead: Leslie Froeschl)
 - The project execution plan (PEP) contains descriptions of the standard operating procedures for the project. The PEP, along with the project's SOPs, is meant to serve as an orientation source for new project staff and to provide guidelines to the processes we use to execute the project.
- **Wiki Standards and Guidelines** (Lead: Deb Nigra)
 - The XSEDE project uses a wiki that is largely open to the public. This policy document governs the access and use of the wiki.
- **Recommendations** (Lead: Leslie Froeschl)
 - The XSEDE project is regularly reviewed by various stakeholder groups (e.g., XSEDE Advisory Board, XSEDE Service Provider Forum, National Science Foundation). A product of these reviews is recommendations for the project. These recommendations are logged and addressed by XSEDE staff using JIRA.

Project Managers by Area

WBS	Area	Director(s)/Manager(s)	Deputy Director/Manager	Project Manager
2.0	XSEDE2	John Towns		
2.1	CEE	Kelly Gaither	Linda Akli	Leslie Morsek
2.1.1	CEE - DO	Kelly Gaither		Leslie Morsek
2.1.2	CEE - WD	Linda Akli		Leslie Morsek
2.1.3	CEE - UE	Bryan Snead		Leslie Morsek
2.1.4	CEE - BP	Linda Akli		Leslie Morsek
2.1.5	CEE - UII	Maytal Dahan		Leslie Morsek
2.1.6	CEE - CE	Henry Neeman Dana Brunson		Leslie Morsek
2.2	ECSS	Phil Blood Robert Sinkovits	Sergiu Sanielevici	Marques Bland

2.2.1	ECSS - DO	Phil Blood Robert Sinkovits		Marques Bland
2.2.2	ECSS - ESRT	Lonnie Crosby		Marques Bland
2.2.3	ECSS - NIP	Sergiu Sanielevici		Marques Bland
2.2.4	ECSS - ESCC	Lars Koesterke		Marques Bland
2.2.5	ECSS - ESSGW	Rob Quick		Marques Bland
2.2.6	ECSS - ESTEO	Jay Alameda		Marques Bland
2.3	XCI	Dave Lifka	Craig Stewart	Lucille Jarzynka
2.3.1	XCI - DO	Dave Lifka		Lucille Jarzynka
2.3.2	XCI - RACD	JP Navarro Shava Smallen		Lucille Jarzynka
2.3.3	XCI - XCRI	Rich Knepper		Lucille Jarzynka
2.4	Ops	Greg Peterson	Victor Hazlewood	Scott Wells
2.4.1	Ops - DO	Greg Peterson		Scott Wells
2.4.2	Ops - Cybersecurity	Jim Marsteller Alex Withers		Scott Wells
2.4.2	Ops - DTS	Tim Boerner	Tabitha Samuel	Scott Wells
2.4.3	Ops - XOC	Carman Hendricks		Scott Wells
2.4.4	Ops - SysOps	Gary Rogers		Scott Wells
2.5	RAS	Dave Hart	Ken Hackworth	Sonia Nayak
2.5.1	RAS - APP	Ken Hackworth		Sonia Nayak
2.5.2	RAS - A3M	Ester Soriano		Sonia Nayak
2.6	Program Office	Ron Payne	Leslie Froeschl	Leslie Froeschl
2.6.1	PO	Ron Payne		Leslie Froeschl
2.6.2	PO - ER	Boswell Hutson		Leslie Froeschl
2.6.3	PO - PM&R	Leslie Froeschl		Leslie Froeschl
2.6.4	PO - BO	Ron Payne		Leslie Froeschl
2.6.5	PO - SP&E	Ron Payne		Leslie Froeschl