A2J Author®
Online Intake Series

Part II: Project Phases & Management

Chicago-Kent
College of Law

ILLINOIS INSTITUTE OF TECHNOLOGY

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Access to Justice & Technology
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Project Phases & Management

Guest Presenter

Cynthia Vaughn

Statewide Technology Project Manager

Ohio Legal Assistance Foundation

Topics

1. Project Management Best Practices
2. Tools for Project Management
3. Intro to A2J Online Intake Project Management

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Agenda

- Project Management Best Practices

- Tools for Project Management

- Introduction to A2J Online Intake Project Management

- Questions

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Project Management Practice

- Based on Project Management Institute (see www.pmi.org) best practices.

- Standard for project management that is not just technology, but any project (e.g., making toasters or constructing a new building).

- Breaks down into "process groups".

- Grantors appear to be moving to this standard practice as part of their grant application and implementation requirements.

Project Management Standard Practice Process Groups

- ❑ Initiating
- ❑ Planning
- ❑ Executing
- ❑ Monitoring & Controlling
- ❑ Closing

Initiating (Inception) Process Group

Processes performed to define a new project. *Includes the following specific activities:*

Develop Project Charter – Clear descriptions of the project objectives are developed, including the reasons why a specific project is the best alternative to satisfy the requirements.

Documents include project scope statement, deliverables, project duration and estimated resources necessary to complete the project.

Identify stakeholders – The process of identifying all people or organizations impacted by the project, and documenting relevant information regarding interests and involvement.

Planning (Elaboration) Process Group

Those processes required to establish the scope of a project, refine the objectives, and define the course of action required to attain the objectives that the project was undertaken to achieve.

Includes the following specific activities:

Develop Project Plan – Documents actions necessary to define, prepare integrate and coordinate all plans. The plan is the primary source of information for how the project will be planned, executed, monitored and controlled, and closed.

Planning (Elaboration) Process Group *(continued)*

- Collect Requirements
- Define Scope
- Create Work Breakdown Structure (WBS) and specific deliverables
- Define Activities
- Sequence Activities
- Estimate Activity Resources
- Estimate Activity Durations
- Develop Schedule
- Estimate Costs
- Determine Budget
- Plan Quality (for compliance)
- ***Plan Communications***
- Identify and Plan Risk Management (qualitative and quantitative)
- Plan Procurements

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Executing (Construction & Testing) Process Group

Processes (activities and tasks) performed to complete the work defined in the project plan.

- **Direct and Management Project Execution** – Includes deliverables, work performance information, **change requests**, project plan updates and documentation.
- **Perform Quality Assurance** – Through testing and adherence to compliance issues.
- **Acquire Develop and Manage Project Team**
- **Manage Stakeholder Expectations** – Includes project status updates

Monitoring & Controlling Process Group

Includes tracking, reviewing and regulating the progress of the project to meet objectives defined in the project plan.

- **Perform Iterative and Integrated Change Control** – Includes reviewing all change requests, managing changes to deliverables, process assets and project documents.
- **Verify scope** – Formalizing acceptance of completed project deliverables.
- **Control Scope** – Includes managing scope creep, scope schedule.
- **Control Costs** – Includes monitoring the status of the project's budget.
- **Perform Quality Control** – Includes monitoring and recording results of quality assessment and testing activities.
- **Report Performance** – Collect and distribute performance information using status reports, progress measurements and forecasts.
- **Monitor and Control Risks** – Includes tracking identified risks, identify new risks, and evaluate risk process effectiveness throughout the project.

Closing (Transition & Launch) Process Group

Processes performed to finalize all activities across all process groups to formally complete the project.

- **Close Project or Phase** – All final activities including launch.

- **Complete Project Procurements** (as appropriate)

Notes

It is **not** always necessary to fully develop every process for every project, but they should be applied as appropriate based on the complexities of the project.

Tools for Project Management

- Microsoft Project
- Basecamp
- Central Desktop
- SharePoint
- See also other products (review) at http://online-project-management-review.toptenreviews.com/index.html

Introduction to A2J Online Intake

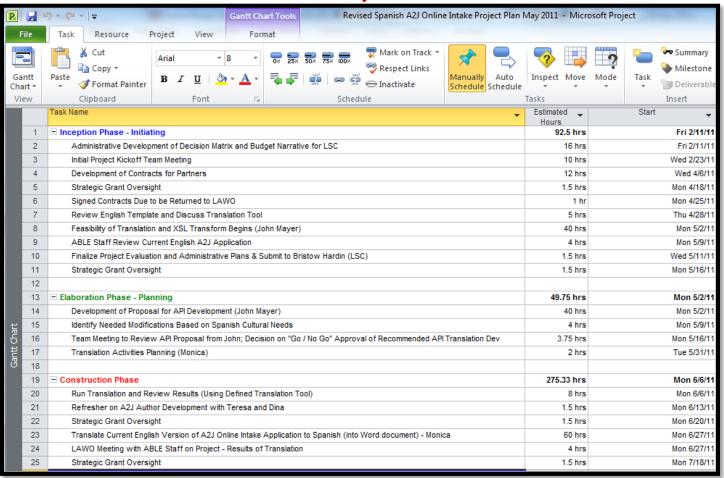**Project example** – Training A2J Document PDF

Example

Your **TIG application** is the project plan

Your ***project schedule*** is separated into "phases" and a work breakdown structure (WBS) that defines:

- specific tasks,
- when tasks are to be done,
- how long they will take, and
- who is doing the work.

Note: Don't confuse a project plan with a project schedule.

Example: Spanish A2J Online Intake Project Schedule

		Task Name	Estimated Hours	Start
	1	□ **Inception Phase - Initiating**	92.5 hrs	Fri 2/11/11
	2	Administrative Development of Decision Matrix and Budget Narrative for LSC	16 hrs	Fri 2/11/11
	3	Initial Project Kickoff Team Meeting	10 hrs	Wed 2/23/11
	4	Development of Contracts for Partners	12 hrs	Wed 4/6/11
	5	Strategic Grant Oversight	1.5 hrs	Mon 4/18/11
	6	Signed Contracts Due to be Returned to LAWO	1 hr	Mon 4/25/11
	7	Review English Template and Discuss Translation Tool	5 hrs	Thu 4/28/11
	8	Feasibility of Translation and XSL Transform Begins (John Mayer)	40 hrs	Mon 5/2/11
	9	ABLE Staff Review Current English A2J Application	4 hrs	Mon 5/9/11
	10	Finalize Project Evaluation and Administrative Plans & Submit to Bristow Hardin (LSC)	1.5 hrs	Wed 5/11/11
	11	Strategic Grant Oversight	1.5 hrs	Mon 5/16/11
	12			
	13	□ **Elaboration Phase - Planning**	49.75 hrs	Mon 5/2/11
	14	Development of Proposal for API Development (John Mayer)	40 hrs	Mon 5/2/11
	15	Identify Needed Modifications Based on Spanish Cultural Needs	4 hrs	Mon 5/9/11
	16	Team Meeting to Review API Proposal from John; Decision on "Go / No Go" Approval of Recommended API Translation Dev	3.75 hrs	Mon 5/16/11
	17	Translation Activities Planning (Monica)	2 hrs	Tue 5/31/11
	18			
	19	□ **Construction Phase**	275.33 hrs	Mon 6/6/11
	20	Run Translation and Review Results (Using Defined Translation Tool)	8 hrs	Mon 6/6/11
	21	Refresher on A2J Author Development with Teresa and Dina	1.5 hrs	Mon 6/13/11
	22	Strategic Grant Oversight	1.5 hrs	Mon 6/20/11
	23	Translate Current English Version of A2J Online Intake Application to Spanish (into Word document) - Monica	60 hrs	Mon 6/27/11
	24	LAWO Meeting with ABLE Staff on Project - Results of Translation	4 hrs	Mon 6/27/11
	25	Strategic Grant Oversight	1.5 hrs	Mon 7/18/11

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Notes

Use your documented intake process to drive A2J online intake template development (versus using the template to drive the intake process).

Programs with Online Intake Projects

Online Intake and Online Screening Systems in Legal Services
Informal Survey of Programs, June 2011
Legal Assistance of Western New York, Inc.

Contents:

List of Programs with Online Intake

Created by Jeff Hogue at Legal Assistance of Western New York

https://docs.google.com/document/d/1gV6pwHK3A39h8hGENJfyR_T_SlfTCYLU6CCfjp4cjvM/edit?hl=en_US&authkey=ClfZ1JkH

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Questions?

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Project Phases & Management

Keep in Mind

1. Take the time to plan ahead before jumping into the interview – will take more time

2. Don't let the interview drive your intake process, make the online intake interview work within your existing intake process

3. Make a variable map from the get go: variable names in A2J – variable name in CMS

4. Every project is unique!

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Additional Resources

- **A2JAuthor.org Online Intake Tools & Trainings Page:** Find information from past trainings including

  - Sample interviews from other programs
  - Slides and recordings from past trainings

- **LSC Online Intake Policy, Compliance Considerations and Future Thoughts:**
http://tig.lsc.gov/presentations2011.php#onlineintake

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Questions? Feedback?

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