



Open Science Grid

Project Coordination Planning and Tracking

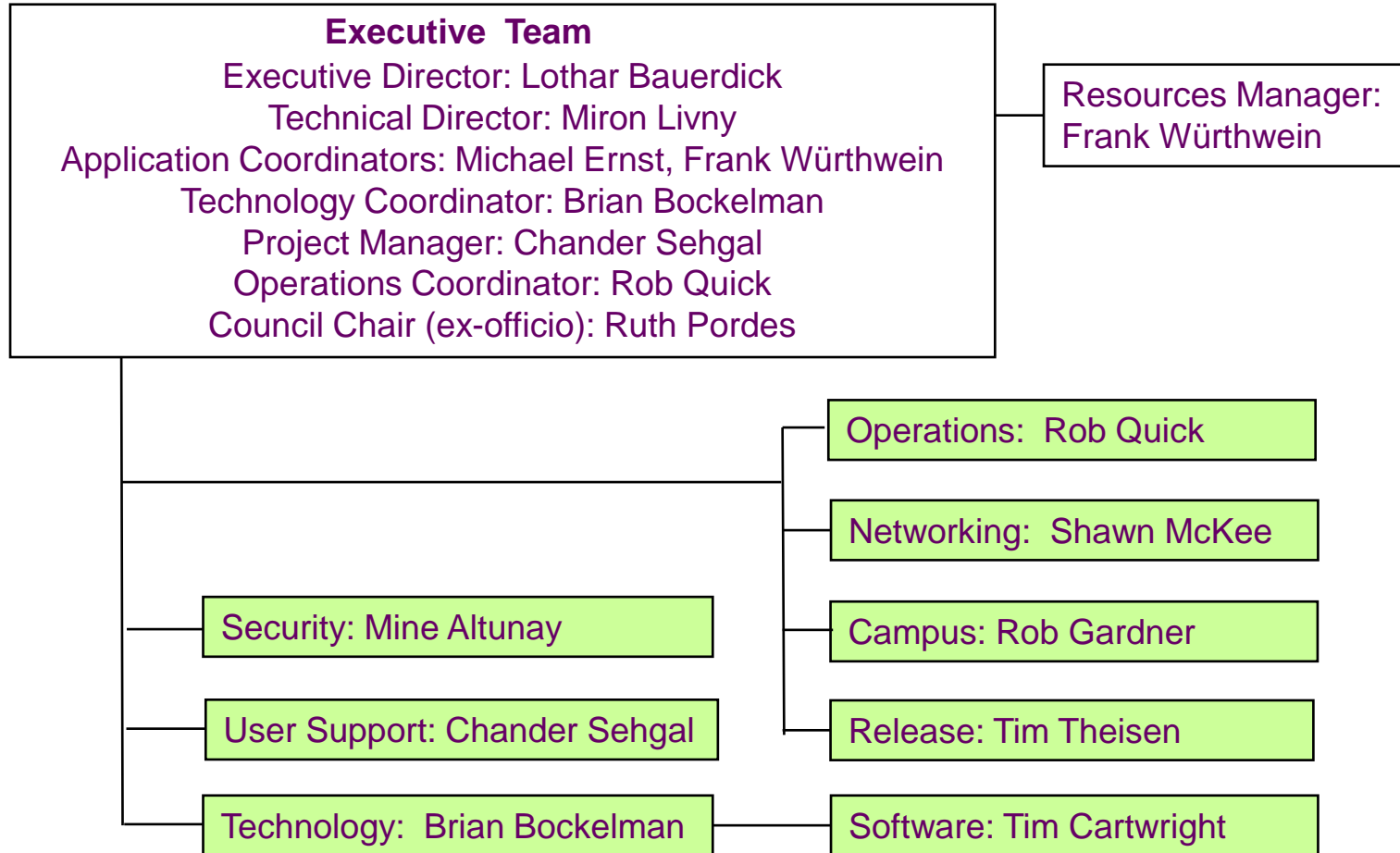
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OSG Project Organization



The work program in different functional areas is executed by “Area Coordinators” with oversight by the Executive Team



Planning Work Program

Annual Work Planning Cycle (May/June)

- Strategic goals and objectives from Executive Team informed by stakeholder needs, OSG Council input, and OSG proposal
- Deployed to Area Coordinators who develop detailed work plans for their areas (strongly linked to Annual SOW & budget process)
- Planning Retreat in Madison (attended by Executive Team and Area Coordinators) to review and finalize work plans
- Transform work plans to WBS and baseline in DocDB

Process informed by staffing plan from project institutions who provide expertise and effort (paid and un-paid contributions)



SOWs & Budget

Annual Statement of Work Process (June/July)

1. Document staffing, work contributions, and budget at each institution in support of the overall OSG project work program (strongly linked to annual work planning process)
2. SOWs signed by institutional PIs and OSG management
3. Results in funding sub-contract from UW-Madison to each institution (BNL & FNAL funded directly from DOE)

Annual Budget Process (June/July)

1. Determine carry-over at each institution
2. Determine planned budget for upcoming year
3. Allocate new budget to each institution based on [2] less [1]



Tracking Work Execution

Weekly Area coordinator calls – convened by Project Office

1. Rotating agenda – one Area Coordinator work program reviewed in each week's session
2. Review accomplishments, initiatives, and concerns
3. Email summary to Area Coordinators and Executive Team

Issue Management: If needed, identify work progress issues requiring corrective action and escalate to Executive Team; formulate recovery plan and track resolution

Reporting

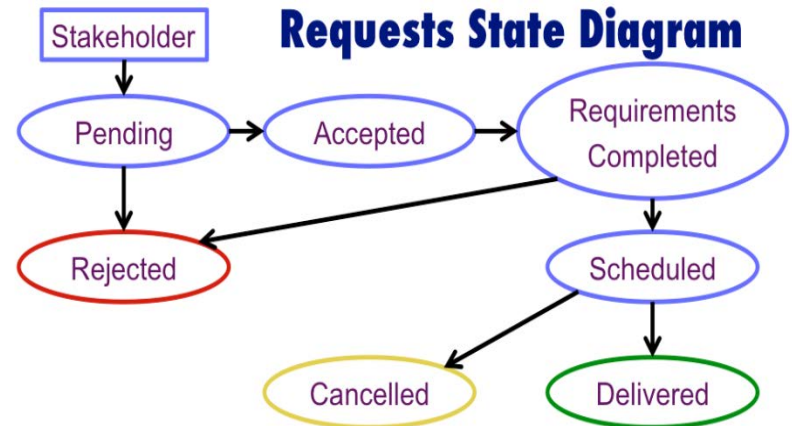
1. Quarterly reports summarizing progress to ET
2. Annual Report (Feb/Mar) to NSF/DOE



Stakeholder Requests

Request submission

Stakeholders submit a request to OSG staff or directly to JIRA: Need/context, VO, requester contact info, functional area, due date, status, etc.



Request Tracking and Resolution

- Area coordinators review request dashboard weekly and determine action plans: pending requests and their assignment to functional areas; requests about to be past-due; accepted but not acted upon for 2 months; etc....
- Assigned Area coordinator is responsible for fulfilling the request. Requester is notified of change of status and comments to the request.



OSG multi-year Budget

Institution	Year1 Actual	Year2 Actual	Year3 Actual	Year4 Planned	Year5 Planned	5-year Total
Wisconsin	\$881,000	\$881,000	\$961,000	\$961,000	\$961,000	\$4,645,000
Morgridge	\$105,000	\$28,000	\$0	\$105,000	\$105,000	\$343,000
Michigan	\$65,000	\$66,000	\$65,000	\$67,000	\$67,000	\$330,000
UCSD	\$445,000	\$510,000	\$504,000	\$600,000	\$600,000	\$2,659,000
Chicago	\$726,000	\$517,000	\$506,000	\$710,000	\$710,000	\$3,169,000
Indiana	\$764,000	\$760,000	\$1,010,000	\$890,000	\$890,000	\$4,314,000
USC-ISI	\$168,000	\$130,000	\$190,000	\$190,000	\$190,000	\$868,000
Nebraska	\$283,000	\$322,000	\$185,000	\$427,000	\$427,000	\$1,644,000
UIUC/NCSA	\$171,000	\$104,000	\$90,000	\$120,000	\$120,000	\$605,000
Subcontract Costs	\$101,000					\$101,000
Unallocated	\$41,000	\$432,000	\$217,000	-\$345,000	-\$345,000	\$0
OSG User School			\$22,000	\$25,000	\$25,000	\$72,000
OSG NSF Total	\$3,750,000	\$3,750,000	\$3,750,000	\$3,750,000	\$3,750,000	\$18,750,000
BNL	\$338,000	\$349,000	\$360,000	\$371,000	\$382,000	\$1,800,000
FNAL	\$1,290,000	\$1,290,000	\$1,290,000	\$1,290,000	\$1,290,000	\$6,450,000
OSG DOE Total	\$1,628,000	\$1,639,000	\$1,650,000	\$1,661,000	\$1,672,000	\$8,250,000
OSG Project Total	\$5,378,000	\$5,389,000	\$5,400,000	\$5,411,000	\$5,422,000	\$27,000,000

>> Updated based on OSG year3 SOWs



OSG year3 Effort Deployment

Functional Area	Paid-FTE	Total-FTE
Technology Investigations	1.8	1.8
Software	5.8	5.8
User School	0.2	0.2
Release Management	1.5	1.9
Operations	8.8	10.5
Campus Grids	2.8	2.8
Network Monitoring	0.2	0.2
Security	2.1	2.3
User Support	3.0	3.0
Project Office	1.2	1.7
Total	27.3	30.1