

DG Environment

Unit Directorate D – Natural Capital

Project Handbook

**Forest Information System for Europe (FISE)**

Date: 29/06/2018

Doc. Version: 1.0

Template Version: 2.5.1



*This template is based on PM² V52.*

*For the latest version of this template please visit the PM² Wiki*

**Document Control Information**

|  |  |
| --- | --- |
| **Settings** | **Value** |
| **Document Title:** | Project Handbook |
| **Project Title:** | Forest Information System for Europe (FISE) |
| **Document Author:** | Adriana Baciu, Eau de Web |
| **Project Owner:** | Peter Loeffler, DG Environment |
| **Project Manager:** | Miruna Bădescu, Eau de Web |
| **Doc. Version:** | 1.0 |
| **Sensitivity:** | Limited |
| **Date:** | 29/06/2018 |

**Document Approver(s) and Reviewer(s):**

NOTE: All Approvers are required. Records of each approver must be maintained. All Reviewers in the list are considered required unless explicitly listed as Optional.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Role** | **Action** | **Date** |
|  |  | <Approve / Review> |  |
|  |  |  |  |
|  |  |  |  |

**Document history:**

The Document Author is authorized to make the following types of changes to the document without requiring that the document be re-approved:

* Editorial, formatting, and spelling
* Clarification

To request a change to this document, contact the Document Author or Owner.

Changes to this document are summarized in the following table in reverse chronological order (latest version first).

|  |  |  |  |
| --- | --- | --- | --- |
| **Revision** | **Date** | **Created by** | **Short Description of Changes** |
| 1.0 | 29/06/2018 | Adriana Baciu | Initial drafting |
| 1.1 | 18/07/2018 | Miruna Bădescu | Review |
|  |  |  |  |

**Configuration Management: Document Location**

The latest version of this controlled document is stored in <https://projects.eionet.europa.eu/fise-project/library/>

TABLE OF CONTENTS

1. About the Project Handbook 5

2. Project Overview 6

2.1. Project Objectives 6

2.2. Critical Success Factors and Project Management Objectives 6

2.3. Project Stakeholders 7

2.4. Project Dependencies or Interrelations 9

2.5. Project Constraints 10

2.5.1. Planning constraints 10

2.5.2. Policy constraints 10

2.5.3. Technological constraints 11

3. Project Approach 11

3.1. Project Lifecycle 11

3.2. PM² Tailoring – Required Project Documentation 12

3.3. Other Standards 13

3.4. Specific Project Management Rules 13

3.5. Conflict Resolution and Escalations 13

4. Project Processes 14

4.1. Risk Management 14

4.2. Issue Management 14

4.3. Requirements Management 15

4.4. Project Change Management 15

4.5. Configuration Management 16

4.6. Communications Management 16

4.7. Resource Management 17

5. Project Progress Measurement 18

5.1. Project Progress Measuring Approach 18

5.2. Project Reports 18

5.2.1. Interim Report 18

5.2.2. Status and Progress Reports 18

5.2.3. Project-end Report 18

6. Project Roles & Responsibilities 18

6.1. Description of Project Roles and Responsibilities 20

6.1.1. Project Stakeholders 20

6.1.2. Project Steering Committee (PSC) 21

6.1.3. Business Implementation Group (BIG) 24

6.1.4. Project Core Team (PCT) 25

7. Appendix 1: References and Related Documents 28

# About the Project Handbook

The Project Handbook documents the selected approach for implementing the project goals. It also highlights the key controlling processes to be used, the project policies and rules, and the overall management approach.

The main goal and long-term vision for the Forest Information System for Europe (FISE) is to provide target groups with comprehensive forest data and information on a single website featuring a user-friendly interface. The FISE portal aims to provide better forest data and statistics compared to what is currently on the market, offering a consistent line of generic products and customisable output formats (map overlays, data sets, customisable graphs, downloadable pdf fact sheets etc.), addressing all aspects and parameters to reflect the holistic understanding of forest ecosystems and management advocated in the EU Forest Strategy.

The Project Handbook is an important document, since it defines the outputs of the planning (i.e. it defines the plans necessary for managing the project as well as to what extent they should be customize or/and tailored).

The Project Handbook becomes the basis for managing the project throughout its lifecycle and is an important point of reference for all project members and stakeholders. The Project Handbook is kept up to date throughout the life of the project. During the Closing Phase, the Project Handbook becomes an important point of reference for the Project-End Review Meeting, and should be properly closed and archived.

# Project Overview

## Project Objectives

By developing FISE, DG Environment aims to accomplish the following overall objectives:

* Provide **enhanced forest information** to gather vital information on forest ecosystems conditions and monitor the relevant trends for informed policy decisions, funding and management.
* **Sustainable forest management**,to encourage forest management practices which preserve and enhance all forest ecosystem functions and services. Main actions include work on criteria and indicators for sustainable forest management and sustainable biomass; promote the wider use of forest management plans and the integration therein of ecosystem approaches and biodiversity concerns.
* **Valuing forests** to help identify, value and include the full value of forests into statistics, accounts, decision-making and payments to forest owners. Main actions include MAES-Forests, payment for ecosystem services in forests.
* **Integration** of the forest environmental needs in the various policy objectives and initiatives of DG ENV and the Commission at large.  Forests are affected by a number of policies and decisions, and their main tasks are achievable only if our objectives are sufficiently reflected across all relevant policies.

The main objective of this specific project is to provide the IT and consultancy services needed to enable the European Commission and the EEA to publish, by the end of 2019, a fully functional usable and publicly accessible first version of FISE on the internet, with all the requested data, information, maps and GIS services.

In short, FISE’s key objectives listed by the concept paper are:

* Inform policy making and decision-taking
* Support monitoring and assessments, potentially support reporting
* Facilitate expert knowledge sharing, research and innovation
* Improve public awareness and knowledge

The FISE system must be fully compatible and compliant with the EEA's IT architecture and infrastructure. It should be designed to be regularly updated and to be extended and upgraded to accommodate new content and functions, in response to user needs and availability of new forest related data and information.

## Critical Success Factors and Project Management Objectives

**Critical Success Factors**

* Involvement of stakeholders from the very beginning of the project, support for obtaining the datasets from institutions especially the ones that will signature of protocols/mutual agreements at institution level
* Quick and clear definition of use cases
* Decisions regarding implementation are made in a time efficient manner
* Limited number of project changes
* Clear objectives and priorities (which are continuously managed and adapted)
* Clear and efficient communication between project stakeholders, very good collaboration
* Usage of central task management tool – Taskman, by all stakeholders to disseminate knowledge and to track progress on activities
* Up to date architectural documentation
* Stakeholder involvement and expectation management
* Continuous learning by all project stakeholders, knowledge sharing
* Low overtime worked, little or no rework needed

**Additional Project Management Objectives**

Project Management Objectives

* All project objectives are achieved within quality, time and cost objectives
* Strong Quality Control on all phases of the project
* Satisfied stakeholders
* Adapting to change by all project stakeholders
* On time communication between the stakeholders involved in the project
* Good teaming between the various organizations involved in the project, frequent face-to-face meetings (in person or virtual) for building trust and collaboration

## Project Stakeholders

In this project organisation there a series of stakeholders, involved either directly or indirectly (as potential data/information/knowledge providers)

As laid out in the Concept paper, the governance of FISE, in terms of system infrastructure and ownership is described by the figure below:

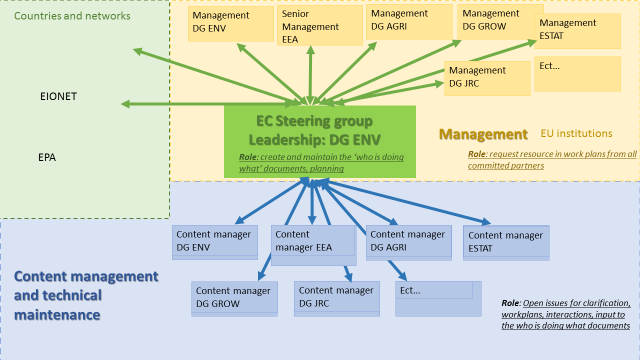


Figure 1 - the system architecture and ownerships that lead to how governance is organised

The Commission and the EEA will develop use case scenarios for the different targeted user groups from the table below, in order to help developers come up with the right representation and visualization of the forest data available.

A first schematic list of needs from stakeholders is presented below.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Stakeholders | Need description | Priority |
| Site end  users |  |  |  |
| Global and international agencies and organisations | * Consultation of the information | + |
| EU institutions | * Information on forest ecosystem services, conditions and their trends * Assessment of policy effectiveness and impacts in various parameters (e.g. carbon sink, biodiversity, growing stock, ownership…) * Information relevant for compliance checking with EU legislation * Support to policy developments in forest related fields * Implementation of other policies related to forests | +++ |
| National governments and authorities | * Access information from neighboring countries on forest environment * Comparative assessment on implementation and state of the environment with other countries * Access to European level information and aggregated summary information, such as contrasting officially submitted carbon data in the context of biomass, biomass extraction and possibly soil | +++ |
| +++ |
| (Non-research) professionals and experts | * Information on state of, and changes in forest conditions and implementation of EU policies * Easy access to reference documents * Sharing of data, e.g. via national, European or international associations for comparison of performance indicators | ++ |
| Scientists, researchers | * Information and data relevant for their studies * Dissemination portal for studies of European relevance * Share data and information resulting from their scientific work | ++ |
| Wider public and media | * Access to information on state of the environment on the area where they live or travel * Performance of their region or country in relation to others | ++ |
| Content  providers |  |  |  |
| DGs | * Easy way to provide and maintain data * Clear and solid dataflow and workflow | ++ |
| EEA | ++ |
| National groups | ++ |
| Reviewers |  |  |  |
| EU Commission | - High usability website - Content clearly accessible | +++ |
| EEA staff (IDM and NSS) | - Easy way to manage and maintain the content | ++ |

Below we present the list of people involved and responsible for this project and their roles within the project.

|  |  |
| --- | --- |
| Roles | Staff Name |
| Project Steering Committee (PSC) | |
| Project Owner | Peter Loffler - DG ENV |
| Business Manager | Annemarie Bastrup-Birk - NSS2 |
| Business Manager (backup) | Andrus Meiner - NSS2 |
| Solution Provider | Christian-Xavier Prosperini - IDM2 |
| Project Manager | Miruna Bădescu - Eau de Web |
| Domain Expert(s) | Peter Vogt, Bernd Eckhardt - JRC |
| Architecture Office | Antonio de Marinis - IDM2 |
| Project Support Team (PST) | |
| Maps Manager | Sebastien Petit - IDM3 |
| Daviz Assistant | Carsten IVERSEN - IDM |
| System Administrators | Adrian Dascalu, Florin Ungureanu |
| Project Core Team (PCT) | |
| EaudeWeb | |
| Agile Product Owner / EdW PM | Miruna Bădescu, Adriana Baciu (backup), Andreea Popescu |
| Web developer(s) | David Bătrânu, Tiberiu Ichim, Krisztina Elekes, Olimpiu Rob,  Cornel Nițu, Diana Boiangiu, Gabriela Strezea, Andrei Duhnea, Sorin Stelian, Ariel Pontes |
| Designer(s) | Valentin Popescu, Cosmin Neagu, Mihai Măcăneață |
| System administrator(s)/DevOps | Anton Cupcea, Andrei Buzoianu |
| Quality assessment(s) | Bogdan Ciobanu |
| Tracasa | |
| GIS designer(s) | Koldo Goñi, Vicente Urdánoz, Leire Leoz |
| Project management | Iratxe Orbe |
| Quality management | Josu Ramírez, |
| GIS developers | Fredrik Thoren, Mikel Gonzalez, David Ramírez |

## Project Dependencies or Interrelations

In response to the EU Forest Strategy, JRC has developed a pilot version of FISE including four modules on forests and natural disturbance, forests and the bioeconomy, forests and climate change, and forests and ecosystem services. Following the decision of JRC in mid-2016 to keep developing new FISE applications but to leave the operation of the system to a different organisation, DG ENV found in the EEA a new partner for the hosting, operation and further development of the system.

During the Kick-off meeting held in Copenhagen on the 24th of April 2018, it was decided that only data will be transferred from the JRC to the EEA, not the web/GIS application developed during the pilot version. The contractors (Eau de Web and Tracasa) will develop new applications to present this data, according to the user stories to be developed by the Commission and the EEA.

For the successful reaching of project’s objectives, a qualitative and quantitative flow of data and information should be ensured for the FISE platform. Therefore, protocols and agreements should be made with the organisations/institutions/Member state/NGOs to provide such data into the FISE platform. The geographical scope of the FISE data flows is the EEA 39 countries (EU28/27, the 5/6 non-EU EEA member countries and the 6 cooperating countries (West Balkan). A continuous supply of quality data is needed to allow the successful implementation of the platform and, afterward, it will EEA to operate FISE and meet the stakeholder’s expectations.

## Project Constraints

### Planning constraints

The main constraint associated with the planning and executing activities is the insurance of continuous supply of quality data from the identified data sources and potentially new data providers. This activity will influence greatly the timeline of the technical activities. Agreement for data provisioning from the identified data source and early identification of potential new data providers is of essence for respecting the milestones planned in the beginning of the project.

Also, a high emphasis should be placed upon the early definition of use cases for this project. For this, there is need of timely involvement from the business manager and experts from both Commission (several DGs involved), EEA and JRC. Identification and collaboration with experts in the forest field will be highly beneficial for the project, as they can greatly help in meeting the stakeholder’s expectations. Involvement of experts for European level and/or member state should happen early in the project. Identification and agreement with at least 2 country experts for data provisioning and use case definitions is one of the ways to ensure that project scope and objectives are successfully met.

As discussed during the initiation phase, the duration of the Contracts is not flexible, the implementation of the final prototype and its online availability is due to happen no later than December 2019. This constraint does not have yet a major influence on the plan but, considering the existing risks and constraint mentioned before, it can have a major impact on the workload of the contractors. Therefore, a close and effective management in this regard should happen and decisions/escalations should be efficiently managed within short cycles.

### Policy constraints

The site should follow the following EEA policies:

1. [EEA legal notices](https://www.eea.europa.eu/legal/), with a strong emphasis on the new ‘**Data Protection Notice**’
2. [EEA standards for web site](http://www.eea.europa.eu/code/design-elements)
3. [EEA's Content Management Systems Policy](https://taskman.eionet.europa.eu/projects/netpub/wiki/Content_Management_Systems_Policy)
4. [EEA's Archiving policy](https://taskman.eionet.europa.eu/projects/netpub/wiki/Archiving_policy)
5. [EEA's Data Policy](http://www.eea.europa.eu/legal/eea-data-policy)
6. IDM2's [Policies](https://taskman.eionet.europa.eu/projects/netpub/wiki/Policies), in particular:
   * [IDM2's security policy for software development](https://taskman.eionet.europa.eu/projects/netpub/wiki/Security_policy_for_software_development)
   * [IDM2's application security strategy](https://taskman.eionet.europa.eu/projects/netpub/wiki/Application_security_strategy)
7. [EEA's data protection strategy](https://taskman.eionet.europa.eu/projects/netpub/wiki/GDPR_compliance_strategy)

Further constraints will be set out in the upcoming ‘**IT security plan’, part of** the architecture overview **that will be elaborated in the planning phase**.

### Technological constraints

* The site will be built with Plone v4.3, based on the EEA Common Plone Buildout (EEA-CPB) and EEA standard Plone dockerised deployments.
* The storage could be the default ZODB objectual database, or using a PostgreSQL backend, in order to reuse a docker-compose architecture done in an existing EEA-managed website.
* The maps services and map viewers will be created using the ArcGIS platform, according to the EEA standards, and shown on the site through iframes. EEA’s IDM3 is supporting the creation and hosting of the maps.
* Dynamic graphs will be done using DAVIZ or Tableau, both frameworks already used in the EEA to build interactive visualizations.

# Project Approach

## Project Lifecycle

Project management lifecycle will follow closely the PM2 lifecycle tailored and used by EEA for project management.

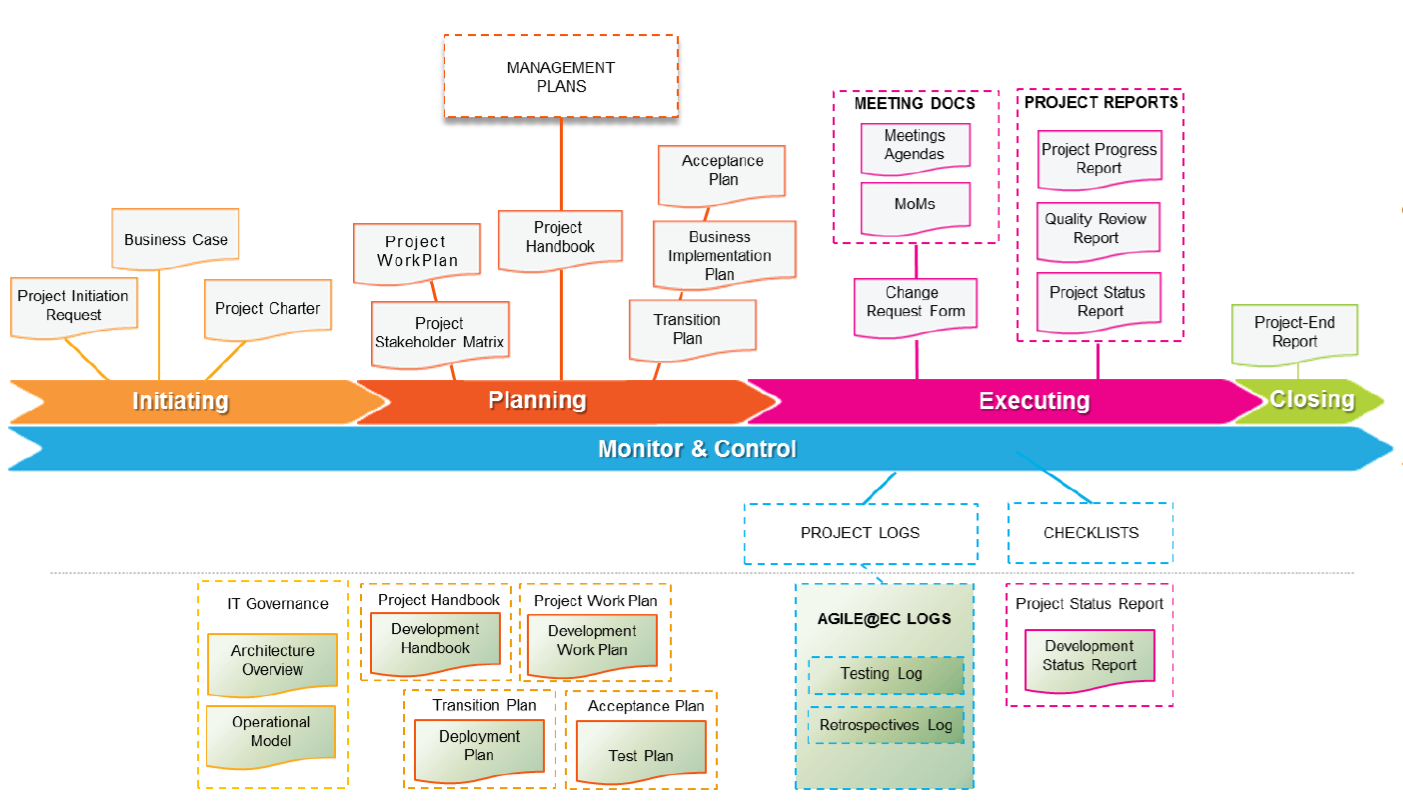


Figure - Project Management Lifecycle

Figure - Project lifecycle from a technical perspective

## PM² Tailoring – Required Project Documentation

|  |  |  |  |
| --- | --- | --- | --- |
| Artefact | Yes/No | Location | If No, briefly explain the reason |
| Project Initiation Request | 🗸 | <https://projects.eionet.europa.eu/fise-project/library/1.-initiating-phase/fise-concept-paper/download/en/1/Concept%20paper%20FISE%201.0_ABB_rev3.1_changes%20accepted.docx> |  |
| Business Case (under the form of a Concept Paper) | 🗸 | [Project repository](https://projects.eionet.europa.eu/fise-project/library/1.-initiating-phase/fise-concept-paper) |  |
| Project Charter | 🗸 | [Project repository](https://projects.eionet.europa.eu/fise-project/library/1.-initiating-phase/fise-project-charter) |  |
| Project Handbook (this document) | 🗸 | Project repository |  |
| Project Work Plan | 🗸 | Project repository and Wiki on Taskman |  |
| Minutes of meetings |  | <https://projects.eionet.europa.eu/fise-project/library/meetings-and-related-documents/> |  |
|  |  |  |  |
|  |  |  |  |

## Other Standards

Additionally to PM2, the project will follow the Agile IT workflows specified by the EEA.

The following standards were considered when defining project approach:

1. [EEA legal notices](https://www.eea.europa.eu/legal/), with a strong emphasis on the new ‘Data Protection Notice’
2. [EEA standards for web site](http://www.eea.europa.eu/code/design-elements)
3. [EEA's Content Management Systems Policy](https://taskman.eionet.europa.eu/projects/netpub/wiki/Content_Management_Systems_Policy)
4. [EEA's Archiving policy](https://taskman.eionet.europa.eu/projects/netpub/wiki/Archiving_policy)
5. [EEA's Data Policy](http://www.eea.europa.eu/legal/eea-data-policy)
6. IDM2's [Policies](https://taskman.eionet.europa.eu/projects/netpub/wiki/Policies), in particular:
   * [IDM2's security policy for software development](https://taskman.eionet.europa.eu/projects/netpub/wiki/Security_policy_for_software_development)
   * [IDM2's application security strategy](https://taskman.eionet.europa.eu/projects/netpub/wiki/Application_security_strategy)
7. [EEA's data protection strategy](https://taskman.eionet.europa.eu/projects/netpub/wiki/GDPR_compliance_strategy)

## Specific Project Management Rules

As project management activities for this project will be performed by Eau de Web, Tracasa should discuss/direct all communications, issues and escalations within this project with the knowledge of Eau de Web. For this, the logs (risks, issues, escalations) that will be available in the project library will be jointly maintained and notices on updates should be sent to the Eau de Web project management team.

Tracasa will collaborate closely with Eau de Web during the elaboration of project management/contractual deliverables and will provide all necessary information needed and requested.

## Conflict Resolution and Escalations

Conflicts are situations in which one or both parties perceive a threat. They are considered to be critical issues and can be raised by any of the project stakeholders. The Project Management team should proactively identify, log and raise such issues for resolution. When required, conflicts are discussed on the Project Follow-up Meetings or, if needed, escalated to the Project Steering Committee (PSC).

Conflict resolution activities are registered in the Issue Log, while conflict resolution decisions can be logged in the Decision Log.

The escalation procedure for this project is as following:

* Only issues/changes/risks with Very Low and Low impact can be approved by the Project Core Team (PCT). In this case, the Project Manager (PM) must always be informed and decisions are registered in the Decision Log;
* Issues/changes/risks with Medium impact are approved by the Managing Level (Project Manager and Business Manager) during the Project Follow-up Meetings;
* Issues/changes/risks with High and very High impact are approved by the Project Steering Committee (PSC);
* When relevant, the Project Steering Committee (PSC) has extraordinary meetings for approving remediation actions related to urgent or very urgent issues with considerable impact or size.

# Project Processes

## Risk Management

The project risk management process defines the activities to identify, assess, prioritise, manage and control risks that may affect the execution of the project and the achievement of its objectives. This is a four step process:

* **Risk Identification:** risks are continuously identified throughout the project lifecycle by any project stakeholder and documented in the Risk Log (by any project team member).
* **Risk Assessment:** risks are assessed based on their likelihood of occurrence and the impact in project objectives. The product of their likelihood and impact defines the Risk Level which is then used as a reference for their prioritisation and risk response development.
* **Risk Response Development:** there are four strategies to be considered as risk responses: Avoid Transfer or Share, Reduce or Accept a risk. After the strategy for each risk has been selected, specific actions to implement the strategy will be defined, described, scheduled and assigned, while a Risk Owner assumes the responsibility for its implementation. These actions will be incorporated into the Project Work Plan.
* **Risk Control:** the Project Follow-up Meetings are used to revise the status of risks and related actions, and to identify new risks. Risks will be revised weekly, but also after the occurrence of any significant event. If any of the identified risks occur, then the Project Manager (PM) will implement the contingency plans and communicate the issue to the Project Steering Committee (PSC).

## Issue Management

The project issue management process defines the activities related to identifying, documenting, assessing, prioritizing, assigning, resolving and controlling issues. It is a four step process that the Project Manager (PM) executes whenever required throughout the project lifecycle:

* **Issue Identification:** Issues can be identified by any project stakeholder throughout the project lifecycle, using different communication channels such as meetings, emails, and reports. The issues are registered in the Issue Log.
* **Issue Assessment and Action Recommendation**: a first informal assessment considers the category, impact, urgency and size of the issue, followed by a more detailed analysis to identify the root cause and recommend a solution. This information is documented in the Issue Log and used as input to the appropriate decision makers (based on the escalation process). The decision is documented in the Decision Log.
* **Actions Implementation:** After issues are evaluated and the remediation actions approved, the Project Manager (PM) will incorporate these actions into the Project Work Plan and update project related documentation such as project plans and logs
* **Issue Control:** Project Follow-up meetings will be performed weekly and used to revise the status of issues and related actions, and to identify new issues. Additionally, the Project Manager (PM) will report monthly the status of the major issues to the Project Steering Committee (PSC) and, when adequate, to other project stakeholders

## Requirements Management

The requirements management process comprises the activities related to the specification, evaluation, approval, monitoring and validation of the project's requirements. This process consists of the following steps:

* **Specify Requirements:** gather the project requirements together with the project stakeholders and document them unambiguously in the Taskman tickets. Structure them by adding relevant titles and supporting documents, as well as placing them into the corresponding hierarchy.
* **Evaluate Requirements:** the project team assesses the feasibility of the requirements and estimates the costs to realise them. The Project Manager (PM), with the help of the Contract Project Manager, balances the list of requirements with the other project constraints (budget, time, etc.) and proposes them to the project stakeholders.
* **Approve Requirements:** the Project Manager (PM) negotiates and agrees the requirements that will be realized during the project with the relevant stakeholders, such as the Project Owner (PO) or the Business manager (BM). The approved requirements become the baseline of the project scope.
* **Monitor Requirements Implementation:** the Project Manager (PM) continuously monitors the implementation of the requirements by the Project Core Team (PCT), besides the discovery of new requirements or changes to existing requirements.
* **Validate Implemented Requirements:** when the requirements are implemented, the solution is validated by the business users in order to assess if the initial business need is satisfied. Acceptance of the project deliverables will and can be issued on the relevant Taskman tickets, during project meeting or by email, and acceptance of the Project End report will declare the project as closed.

## Project Change Management

The project change management process defines the activities related to identifying, documenting, assessing, approving, prioritising, planning and controlling changes, and communicating them to all relevant stakeholders. It is a five step process that the Project Manager (PM) executes whenever required throughout the project lifecycle:

* **Change Identification:** a request for a change can be identified and raised during meetings as a result of decisions, issues or risks and communicated by email or can be submitted formally via a Change Request Form. The Change Log contains information to identify the change, such as the requestor, a short description, identification date, etc.
* **Change Assessment and Action Recommendation**: the size and impact of the change on the project objectives is assessed, where after a recommended action will be documented by the Project Manager (PM) in the Change Log., This information is then used as an input to the formal change approval by the appropriate decision makers.
* **Change Approval:** the approval of a project change will follow the defined escalation process for this project. For changes which do not have significant impact on delivery time and budget, the changes can be approved during the Project Follow-up Meetings. Other changes (having a size L or XL) are approved by the Project Steering Committee (PSC). The decision details are documented in the Change Log.
* **Change Implementation:** the activities related to the implementation of approved changes will be documented in the Project Work Plan.
* **Change Control:** new or open changes will be identified/reassessed weekly during the Project Follow-up Meetings and the Project Manager (PM) will then update the Change Log with the results of the analysis/review. For the Medium, High and very High Size changes, the Project Manager (PM) will report on a monthly basis their status to the Project Steering Committee (PSC) and, when adequate, to other project stakeholders.

## Configuration Management

The project configuration management procedure comprises the identification of project configuration items (CIs), their attributes and status codes, the establishment of baselines, the definition of roles and responsibilities for authorised changes to CIs, and the maintenance and control of a project repository.

**Storage of project management artefacts**

The Project Manager (PM) structures the project management artefacts per PM2 phase within the online file library <https://projects.eionet.europa.eu/fise-project/library/> , following the below folder convention:

* 01 Initiating
* 02 Planning
* 03 Executing
* 04 Monitor & Control
* 05 Closing

Naming convention of project management artefacts

The following artefact naming convention will be used:  
(DocumentName).(ProjectName).(yyyy-mm-dd).v(x.x), where:

* (XX) (two numerical characters) unique artefact number within the folder indicating the artefact sequence.
* v(x.x) indicates the artefact version. Version numbers like "0.x" mean that the document hasn't been approved yet; minor changes will be reflected in the decimal (revisions number) and major changes (formal reviews) in the number.

**Versioning of project management artefacts**

All project management artefacts are under version control, except for the project logs and checklists.

## Communications Management

The communications management process determines how to communicate most efficiently and effectively to the various stakeholders. It defines and documents the communication items content, format, frequency, the audience and expected results. It also defines how to communicate project status and the assignment of activities to the various stakeholders, and the communication strategy for each stakeholder, based on their interests, expectations and influence in the project.

The following project meetings will be organised:

|  |  |  |
| --- | --- | --- |
| **Meeting** | **Chair** | **Frequency** |
| Planning Kick-off Meeting | Project Manager (PM) | Once |
| Project Status Meeting | Project Manager (PM) | Every 2 weeks |
| Project Core Team Meeting | Team Leader (TL) | Weekly |
| Project Progress Meeting | Project Manager (PM) | Every 12 months |
| Project Steering Committee Meeting | Project Owner (PO) | Every 12 months |
| Change Control Meeting | Project Manager (PM) | Ad Hoc |
| Project-End Review Meeting | Project Manager (PM) | Once |

The following project reports will be delivered:

|  |  |  |
| --- | --- | --- |
| **Report** | **Responsible** | **Frequency** |
| Project Bi-monthly Status Report | Project Manager (PM) | Every 2 months |
| Project Mid-term Progress Report | Project Manager (PM) | December 2018 |
| Quality Review Report | Project Manager (PM) | December 2019 |
| Project-End Report | Project Manager (PM) | January 2020 |

Communication rules for the project:

* Tasks and activities will be managed with Taskman:

Project page: <https://taskman.eionet.europa.eu/projects/fise-dev>

* Taskman will send automatic notifications to all required stakeholders
* Document repository will be used to archive all documentation (wiki or project library on EIONET forum)
* Main meeting such as Kick-off and end-review should be face to face, with the possibility of participating remotely
* Other meetings can be fully virtual (Skype for business)
* Emails will be the main communication tool. The PM may need a communication plan to track the process for each stakeholder.
* Chat (Skype)
* Communication with Commission is handled by Product Owner.

## Resource Management

Resources needs has been evaluated from the initiation phase and assignments have been made in Project charter and then refined in the Project Workplan. Both Eau de Web and TRACASA will ensure at all times the necessary resources according to the project phase.

**Training Needs**

There is no need for training envisaged at this moment.

# Project Progress Measurement

## Project Progress Measuring Approach

The purpose of all Project Reports is to document and summarise the status of various dimensions of the project’s progress, in order to inform relevant project stakeholders. Project reports typically provide information on schedule, cost and also include relevant information on risks, issues, project changes and contract management issues.

Measuring progress on each project is of great importance during the Monitoring &Controlling phase and also in order to ensure a good outcome of the project. For this project we have envisaged two measuring coordinates: schedule management and milestone tracking along with the effort spent indicator.

Measurements on the above-mentioned indicators will happen every 2 months and their current status will be reported and communicated to the project team.

## Project Reports

### Interim Report

Almost half way into the project activities, December 2018, an Interim report will be prepared by the Project Manager with input of the entire management team involved (contractors, EEA). The Project Interim Report gives a high-level overview of the project and its status. It includes a project overview (project stakeholders, milestones and deliverables, project plan, budget and costs) and further project details (scope changes, major risks/issues and actions taken, achievements).

### Status and Progress Reports

Status reports will be compiled every two months, by the Project Manager with involvement of all contractors in the project. There reports will respect the PM2 template agreed to be used in EEA for project management. All reports will be send by email to the Project Owner, Business Manager, Solution Provider and other relevant stakeholders for approval and will be archived in the project library in EIONET.

### Project-end Report

Following the Project-End Review Meeting, the project's overall experience is summarised in a report. Best practices, lessons learned, pitfalls and solutions to particular problems are documented in this report and should be used as a knowledge base for future projects.

Project End Report will be drafted using the MoM from the Project End Review meeting and useful information retrieved from the progress reports. The project Manager is responsible for elaboration of the Project-End report, along with the help of the entire management team and stakeholder. Project-End report may contain also a list of suggested courses of action to improve project deliverables after the project has been closed.

Project-End Report will use the PM2 template.

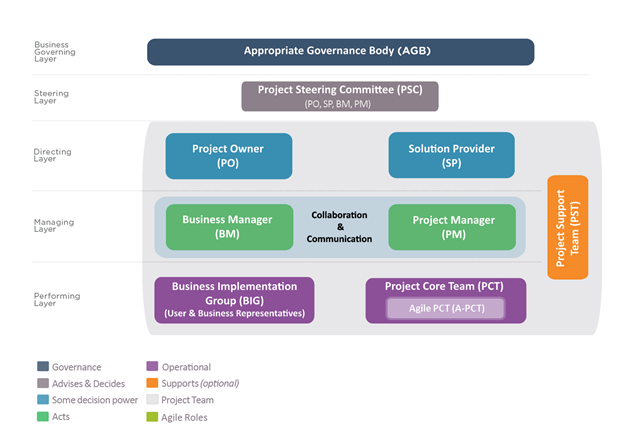
# Project Roles & Responsibilities

Consolidated Responsibilities Assignment Matrix (RAM/RASCI)

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Initiating** | **AGB** | **PSC** | **PO** | **BM** | **UR** | **SP** | **PM** | **PCT** |
| Project Initiation Request | I | n.a. | **A/S** | **R** | **S**/C | I | n.a. | n.a. |
| Business Case | I | C | **A** | **R** | C | **S** | **S** | n.a. |
| Project Charter | I | C | **A** | **S** | C | **S** | **R** | C |
| **Planning** | **AGB** | [**PSC**](http://www.cc.cec/wikis/display/PM2/Project+Steering+Committee+%28PSC%29) | [**PO**](http://www.cc.cec/wikis/display/PM2/System+Owner+%28SO%29) | [**BM**](http://www.cc.cec/wikis/display/PM2/Business+Manager+%28BM%29) | [**UR**](http://www.cc.cec/wikis/display/PM2/User+Representatives+%28UR%29) | [**SP**](http://www.cc.cec/wikis/display/PM2/System+Supplier+%28SS%29) | [**PM**](http://www.cc.cec/wikis/display/PM2/Project+Manager+%28PM%29) | **PCT** |
| Planning Kick-off Meeting | I | **A** | C | **S** | C | C | **R** | C |
| Project Handbook | I | I | **A** | **S** | C | I | **R** | C |
| Project Work Plan | I | **A** | C | **S**/C | C | C | **R** | **S**/C |
| **Executing** | **AGB** | [**PSC**](http://www.cc.cec/wikis/display/PM2/Project+Steering+Committee+%28PSC%29) | [**PO**](http://www.cc.cec/wikis/display/PM2/System+Owner+%28SO%29) | **BM** | [**UR**](http://www.cc.cec/wikis/display/PM2/User+Representatives+%28UR%29) | [**SP**](http://www.cc.cec/wikis/display/PM2/System+Supplier+%28SS%29) | [**PM**](http://www.cc.cec/wikis/display/PM2/Project+Manager+%28PM%29) | [**PCT**](http://www.cc.cec/wikis/display/PM2/Project+Core+Team+%28PCT%29) |
| Project Coordination | I | I | **A** | **S** | I | I | **R** | I |
| Quality Assurance | I | I | I | **S** | C | I | **A** | **R** |
| Project Reporting | I | I | **A** | **S**/C | I/C | I/C | **R** | C |
| Information Distribution | I | I | **A** | C | I | I | **R** | C |
| **Monitor & Control** | **AGB** | [**PSC**](http://www.cc.cec/wikis/display/PM2/Project+Steering+Committee+%28PSC%29) | [**PO**](http://www.cc.cec/wikis/display/PM2/System+Owner+%28SO%29) | **BM** | [**UR**](http://www.cc.cec/wikis/display/PM2/User+Representatives+%28UR%29) | [**SP**](http://www.cc.cec/wikis/display/PM2/System+Supplier+%28SS%29) | **PM** | [**PCT**](http://www.cc.cec/wikis/display/PM2/Project+Core+Team+%28PCT%29) |
| Monitor Project Performance | I | I | **A** | C | C | I | **R** | C |
| Control Schedule | I | I | **A** | C | C | I | **R** | C |
| Control Cost | I | I | **A** | **S**/C | C | I | **R** | C |
| Manage Stakeholders | I | I | **A** | C | I | C | **R** | I |
| Manage Requirements | I | I | **A** | C | C | I | **R** | S |
| Manage Project Changes | I | C | **A** | **S** | I | I | **R** | C |
| Manage Risks | I | C | **A** | **S**/C | C | I | **R** | C |
| Manage Issues & Decisions | I | I | **A** | **S** | C | I | **R** | C |
| Manage Quality | I | I | I | **S**/C | C | **A** | **R** | C |
| Manage Deliverables Acceptance | I | I | **A** | **S** | C | C | **R** | C |
| **Closing** | **AGB** | [**PSC**](http://www.cc.cec/wikis/display/PM2/Project+Steering+Committee+%28PSC%29) | [**PO**](http://www.cc.cec/wikis/display/PM2/System+Owner+%28SO%29) | [**BM**](http://www.cc.cec/wikis/display/PM2/Business+Manager+%28BM%29) | **UR** | [**SP**](http://www.cc.cec/wikis/display/PM2/System+Supplier+%28SS%29) | [**PM**](http://www.cc.cec/wikis/display/PM2/Project+Manager+%28PM%29) | **PCT** |
| Project-End Review Meeting | I | **A** | C | **S** | C | C | **R** | C |
| Project-End Report | I | **A** | C | **S** | C | C | **R** | C |
| Administrative Closure | I | C | **A** | C | I | C | **R** | I |

## Description of Project Roles and Responsibilities

In the following section, the roles of major players in a project are described alongside with the responsibilities, expectations, rights and duties of each participant in the project.

**

### Project Stakeholders

|  |
| --- |
| **Description** |
| Project stakeholders are people (or groups) who can affect or can be affected by both the activities performed during the life of a project, or/and by the project’s output(s) and outcome(s). Stakeholders can be directly involved in a project’s work, or can be members of other internal organisations, or even be external to the performing organisation (e.g. suppliers, users, EU citizens). |
| **Responsibilities** |
| * Assist and support this project by providing expertise and information regarding user stories and stakeholder’s needs to ensure the project’s success * Provide the project team with data on forests, especially datasets and indicators * Test the FISE online platform before its full entering into production |

### Project Steering Committee (PSC)

|  |
| --- |
| **Description** |
| The permanent members of the committee are:   * Project Owner (PO) who chairs the committee, is the key-decision maker and accountable for the success of the project. * Business Manager (BM) who is a delegate of the Project Owner (PO) and collaborates closely with the Project manager (PM). * Solution Provider (SP) who assumes the overall accountability for the project deliverables. * Project Manager (PM) who is responsible for the entire projects and its deliverables * Architecture Office (AO) that plays an advisory role on architectural aspects of information systems. * Contractor's Project Manager (CPM) responsible for the outsourced parts of the project   The optional members of the committee are:   * User Representatives (UR) who represents the interests of the users to the project. |
| **Responsibilities** |
| * Champions the project and raises awareness at senior level. * Guides and promotes the successful execution of the project at a strategic level, keeping the project focused towards its objectives. * Ensures adherence to organisation policies and directions. * Provides high level monitoring and control of the project. * At the end of the Initiating phase, authorises the project to continue, based on the project's Business Case and Project Charter, unless this is performed by the Appropriate Governance Body (AGB). * At the end of the Planning Phase, authorises the project to continue to the Executing phase, based on the Project Handbook and Project Work Plan. * Authorises plan deviations, scope changes with high project impact and decides on recommendations. * Arbitrates on conflicts and negotiates solutions to escalated issues. * Drives and manages change in the organisation caused by the project. * Approves and signs-off the management artefacts regarding quality, delivery and closing (Business Case, Project Charter, Project Work Plan, etc.). |

#### Project Owner (PO)

|  |
| --- |
| **Description** |
| Is the key project decision maker and accountable for project success. |
| **Responsibilities** |
| * Acts as the project champion promoting the success of the project. * Chairs the Project Steering Committee (PSC). * Provides leadership and strategic direction to the Business Manager (BM) and Project Manager (PM). * Sets the business objective and defines the Business Case for the project. * Owns the project risks and assures proper project outcomes are in-line with business objectives and priorities. * Mobilises the necessary resources for the project in accordance to the budget. * Monitors project progress regularly. * Coordinates resolution of issues and conflicts. * Ensures that the project outcome meets the business expectations. * Drives organisation change and monitors proper evolution and change implementation. * Approves and signs-off all key management milestone artefacts (Project Handbook etc.). |

#### Solution Provider (SP)

|  |
| --- |
| **Description** |
| Assumes overall accountability for the project deliverables. |
| **Responsibilities** |
| * Represents the interests of those designing, delivering, procuring, and implementing the project's deliverables. * May help the Project Owner (PO) to define the Business Case and objectives for the project. * Agrees on objectives for the supplier activities and approves the contractor's deliverables for the project (if applicable). * Assumes the overall accountability for project deliverables and services requested by the Project Owner (PO). * Mobilises the required resources from supplier side and appoints the Project Manager (PM) |

#### Business Manager (BM)

|  |
| --- |
| **Description** |
| Represents the Project Owner (PO) on a daily basis within the project and collaborates closely with the Project Manager (PM). |
| **Responsibilities** |
| * Assists the Project Owner (PO) on the specification of the project and the main business objectives. * Establishes and guarantees an efficient collaboration and communication channel with the Project Manager (PM). * Coordinates the Business Implementation Group (BIG) and acts as a liaison between the User Representatives (UR) and the provider organisation. * Is responsible for the Project Initiation Request, Business Case and Business Implementation Plan – if needed. * Ensures that the products delivered by the project fulfil the user's need * Manages the business side activities of the project and assures that the required business resources are made available. * Devises the best track for business change or reengineering actions, when needed. * Ensures that the business organisation is ready to accommodate the project's deliverables when made available by the provider organisation. * Leads the implementation of the business changes within the users DG. * Coordinates the schedule and delivery of user training (and production of necessary user support material). |

#### Project Manager (PM)

|  |
| --- |
| **Description** |
| Manages the project on a daily basis and is responsible for the qualitative product delivery within the imposed constraints. |
| **Responsibilities** |
| * Proposes and executes the project plans as approved by the Project Steering Committee (PSC). * Daily manages and coordinates the Project Core Team (PCT) activities, making optimal use of the allocated resources. * Ensures that project objectives are achieved within the quality, time, and cost objectives, taking preventive or corrective measures where necessary. * Manages stakeholder's expectations. * Is responsible to create all the management artefacts (except Project Initiation Request, Business Case and Business Implementation Plan) and proposes them for approval to the Project Owner (PO) or the Project Steering Committee (PSC). * Ensures a controlled evolution of products under version control, by implementing the Project Change Management Plan. * Compares project actuals and expenditures to what was planned and reports project progress accordingly to the Project Steering Committee (PSC). * Performs risk management for project related risks. * Escalates unresolvable project issues to the Project Steering Committee (PSC) * Liaises between the Directing and Performing Layers of the project. |

### Business Implementation Group (BIG)

|  |
| --- |
| **Description** |
| Consists of representatives from the business and user groups. The Business Implementation Group (BIG) is responsible for implementing the business changes that need to be in place in order for the organisation to be able to effectively integrate the project deliverables into everyday work. |
| **Responsibilities** |
| * Under the coordination of the Business Manager (BM), the Business Implementation Group (BIG) plans and implements the activities needed to achieve the desired business changes as described in the Business Case and the Business Implementation Plan. * Analyses the impact of the project implementation to the ongoing operations and existing business processes, the people and the culture of the organisation. * Participates in the design or updating of any affected business processes. * Prepares the affected business area for the upcoming change * Advises the Business Manager (BM) concerning the readiness of the organisation to change * Embeds the project deliverables into the business operations and implements organisational change activities that fall under the scope of the project. |

#### User Representatives (URs)

|  |
| --- |
| **Description** |
| Represent the interests of the end-users in the project. User Representatives (URs) are part of the Business Implementation Group (BIG). Involving the User Representatives (URs) throughout the project is important, as they gain visibility of project activities, a sense of ownership and motivation, which ensures that the deliverables are fit for business purpose. |
| **Responsibilities** |
| * Helps to define business needs and requirements. * Ensures that the project specifications and deliverables meet the needs of all users. * Approves on behalf of the users the project specification and acceptance criteria. * Communicates and prioritises user opinions in Project Steering Committee (PSC) decisions on whether to implement recommendations on proposed changes. * Participates in demonstrations and pilot phases as needed. * Performs the user acceptance tests. * Guarantees the stability of the business during the transition towards the new operational state. |

### Project Core Team (PCT)

|  |
| --- |
| **Description** |
| Consists of the specialist roles responsible for the creation of the project deliverables. The composition and structure of the Project Core Team (PCT) depends on the size and type of the project (e.g. IT project, policy development project, etc.) and is defined by the Project Manager (PM). |
| **Responsibilities** |
| Under the coordination of the Project Manager (PM), the Project Core Team (PCT):   * Contributes in the elaboration of the project scope and the planning of the project activities. * Performs the project activities according to the project work plan and schedule. * Produces project deliverables. * Provides information to the Project Manager (PM) regarding the progress of activities. * Participates in project meetings as needed and contributes to the resolution of issues. * Participates in the Project-End Meeting to derive and document useful lessons learned for the organisation. |

#### Contractor's Project Manager (CPM)

|  |
| --- |
| **Description** |
| Leads the contractor's staff working on the project. |
| **Responsibilities** |
| * Collaborates closely with the Project Manager (PM). * Plan, controls and reports on the production of deliverables. * Ensures that all work is performed on time and to the agreed standards and quality. * Guarantees the successful completion and delivery of the subcontracted activities. |

#### Assistant Project Manager (APM)

|  |
| --- |
| **Description** |
| In large projects the Project Manager (PM) might find it useful to delegate a part of the project management tasks to an assistant. This Assistant Project Manager (APM) works closely together with the Project Manager (PM) in realizing the project objectives and acts as his backup. Although the Project Manager (PM) can delegate certain tasks to the Assistant project Manager (APM), the PM remains responsible for the correct execution of these tasks. |
| **Responsibilities** |
| * Reports to and takes directions from the Project Manager (PM). * Assists in the development and execution of project and team plans (or parts of it). * Communicates plans, decisions, and instructions to the Project Core Team (PCT) or external contractors. * Participates in coordinating the Project Core team (PCT) and Project Support Team (PST). * Provides guidance to project participants in support of work execution. * Assists with the organisation of project meetings and creating the minutes. * Gathers status information, actuals and forecasts of all work packages and advises the Project Manager (PM) of any discrepancies. * Proactively detects quality or scheduling issues and proposes preventive actions. * Prepares or contributes to project status reports in timely manner. * Supports the risk and change management process, updates the Risk and Change Logs. * Coordinates deliverable acceptance with internal and external users and stakeholders. |

#### Application Management Team (AMT)

|  |
| --- |
| **Description** |
| Team that manages and supports information management applications and keeps them up-and-running according to a service level agreement (SLA). |
| **Responsibilities** |
| * Ensures the day-to-day running of the specific IT applications. * Provides the service to users based on the SLA, the quality plans and standards. * Performs upgrades of the specific IT application software in production after new releases are tested and accepted by the impacted user community. |

#### System Support Team (SST)

|  |
| --- |
| **Description** |
| Team that supports the system infrastructure for information systems, typically focused on hardware, operating systems, networks, databases, etc. This role can be assumed by the Data Centre or the local operations team. |
| **Responsibilities** |
| * Ensures the day-to-day running of the system (hardware and software) in order to provide services to the user community as specified in the service level agreement (SLA). * Maintains the hardware structure and in accordance with the user's needs. * To perform updates of the software (operating systems, etc.). |

#### Architecture Office (AO)

|  |
| --- |
| **Description** |
| Advises project teams on architectural aspects of information systems. |
| **Responsibilities** |
| * Develops architecture standards for all projects. * Approves application and system architecture orientations of the various projects. * Advises project teams on architectural aspects of:   + Application Architecture   + IT Systems Architecture |

# Appendix 1: References and Related Documents

|  |  |  |
| --- | --- | --- |
| **ID** | **Reference or Related Document** | **Source or Link/Location** |
| 1 | FISE Project\_Charter.docx | <https://projects.eionet.europa.eu/fise-project/library/1.-initiating-phase/fise-project-charter> |
| 2 | Project library/repository | <https://projects.eionet.europa.eu/fise-project> |
| 3 | Project Workplan | https://projects.eionet.europa.eu/fise-project/library/02.-planning/fise-project-workplan |
| 4 | EEA online tool - Taskman | https://taskman.eionet.europa.eu/projects/fise-dev |
| 5 | FISE Issue Log | https://projects.eionet.europa.eu/fise-project/library/4.-monitoring-controlling/fise-issue-log |