

Portfolio Design Plan
A Project Plan for the Partial Fulfillment of Requirements
for TS7020

Capella University

by
Scott B. Bradley

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Project Charter

Project Title: Technical Communications Portfolio Design

Project Execution Start Date: June 25, 2003

Project Finish Date: August 7, 2003

Project Manager: Scott Bradley, 1-877-866-9761, scott2b@ureach.com

Project Objectives: Develop a portfolio and promotional package for the purpose of demonstrating services and skills in the field of technical communications and information technology. The portfolio will be in an online interactive format and will include completed works as well as general information about services provided. An additional package of material for client meetings and general physical distribution will come in the form of a hard documentation portfolio and accompanying CD Rom.

Approach:

Assess work to show and general information about services provided

Collect related materials in hard copy and electronic format as appropriate

Develop promotional web site with service information and sample work

Develop client contact portfolio with significant printed materials and electronic materials on CD Rom

Roles and Responsibilities

Name	Role	Responsibility
Scott Bradley	Project Manager	Monitor and develop project
Scott Bradley	Web Developer	Build web content
Scott Bradley	Document Designer	Compile project related documentation
Adam Caouette	Graphic Designer	Design business logo and branding
Jose Lepervanche	Course Instructor / Project Mentor	Review project plans
TS7020 Class	Courseroom Peers	Review project plans

Table 1. Roles and Responsibilities Assignment.

Sign-off:

Only Project Management Signature will be acquired for the purposes of this project.

Scott B. Bradley (Project Manager)

Comments:

This project needs to be completed ASAP. All future business growth depends on completion of this project. SBB

Statement of Work

- I. **Scope of Work:** Work is to include the research and development associated with a promotional package and portfolio for services associated with technical communication design. Development will include both an online electronic portfolio and informational site as well as a hard-copy informational package in portfolio format. The completed electronic portfolio will function over the internet and will also be made available on CD Rom. The hard-copy portfolio will be developed primarily for the purpose of organizing materials that might be presented in meetings with potential clients. Figure 1 diagrams the basic structure of the anticipated web site.
- II. **Location of Work:** Except for work that is outsourced, such as the design and development of business logos, letterhead, and other branding concerns, the scope of work will be completed in the offices of Scott B. Bradley.
- III. **Period of Performance:** While part of completing the project will be to identify areas of new scope for future development, the core of the portfolio project which is outlined in this project plan will be completed in approximately one month.
- IV. **Deliverables Schedule:** Project items will be delivered on schedule as follows:
 - This project plan: June 25, 2003
 - Project web site (phase 1): July 7, 2003
 - Hard copy portfolio and web site (phase 2): July 23, 2003
 - Phase 3, project completion: August 7, 2003
- V. **Applicable Standards:** Web site will be developed in HTML with possible enhancement with JavaScript and CSS. Technical Communications materials should adhere to standards presented by the STC (Society for Technical Communication) where applicable. Electronics and data formatting should adhere to standards according to the IEEE and the W3C where applicable.
- VI. **Acceptance Criteria:** Project will be acceptable upon presentation of an overall package that provides genuine professional presentation of works and services. The litmus test for this package will be the question, “Will this win clients?” Minimum functionality of the web site portion of the work scope will reflect the structure demonstrated in Figure 1.
- VII. **Special Requirements:** This project should be planned with the fact in mind that only a single resource is available for most of the work. By the nature of the project of concern, management and design issues will be handled by a single resource with some consultation of outside independent resources.

Scott Bradley: Technical Communication Design

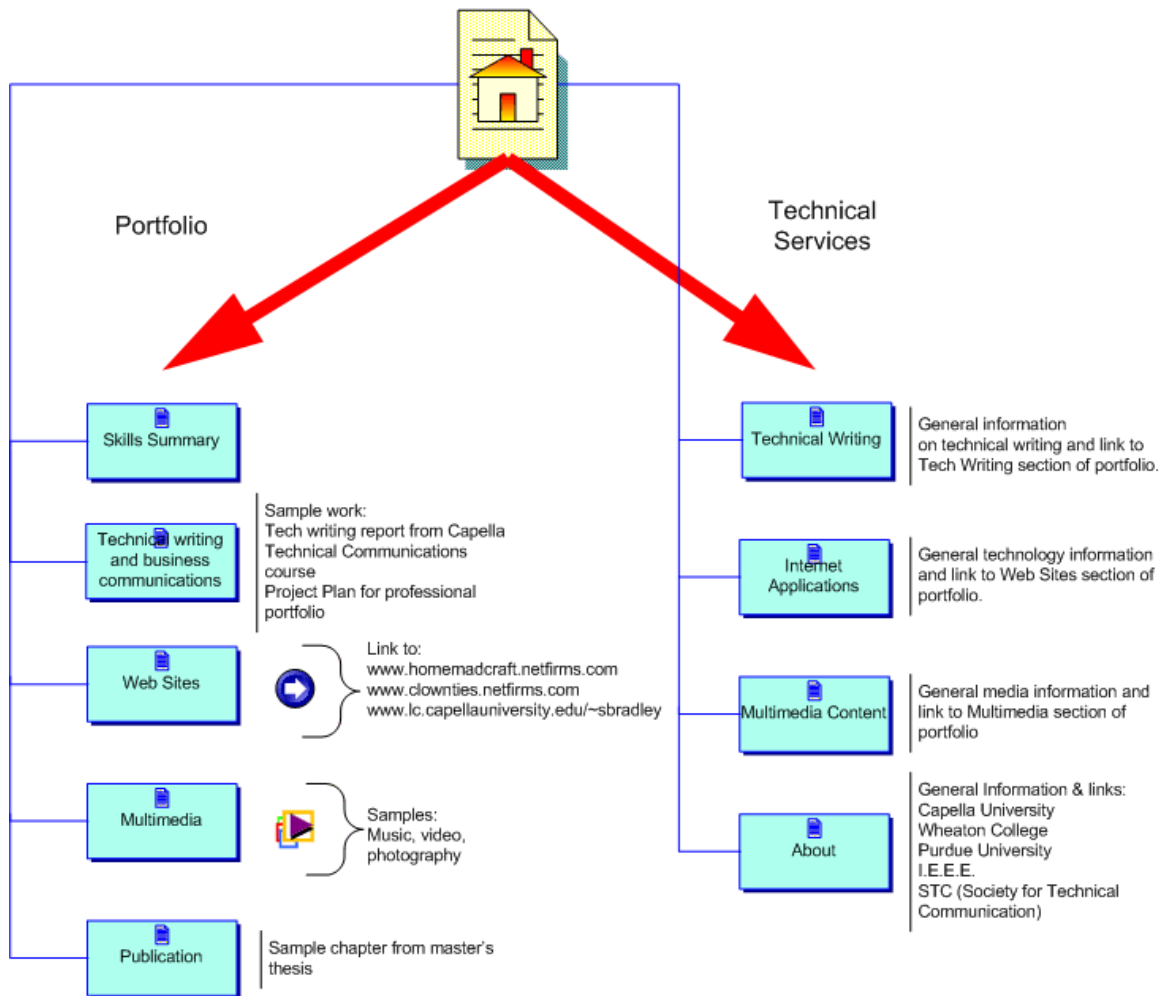


Fig. 1. Site map

Project Management Methodology

The project management methodology of this project plan follows the traditional methodology of the following project management process groups: Initiating, Planning, Executing, Controlling, and Closing. This methodology is outlined in the chart below and is also reflected in the project schedule and Work Breakdown Structure.

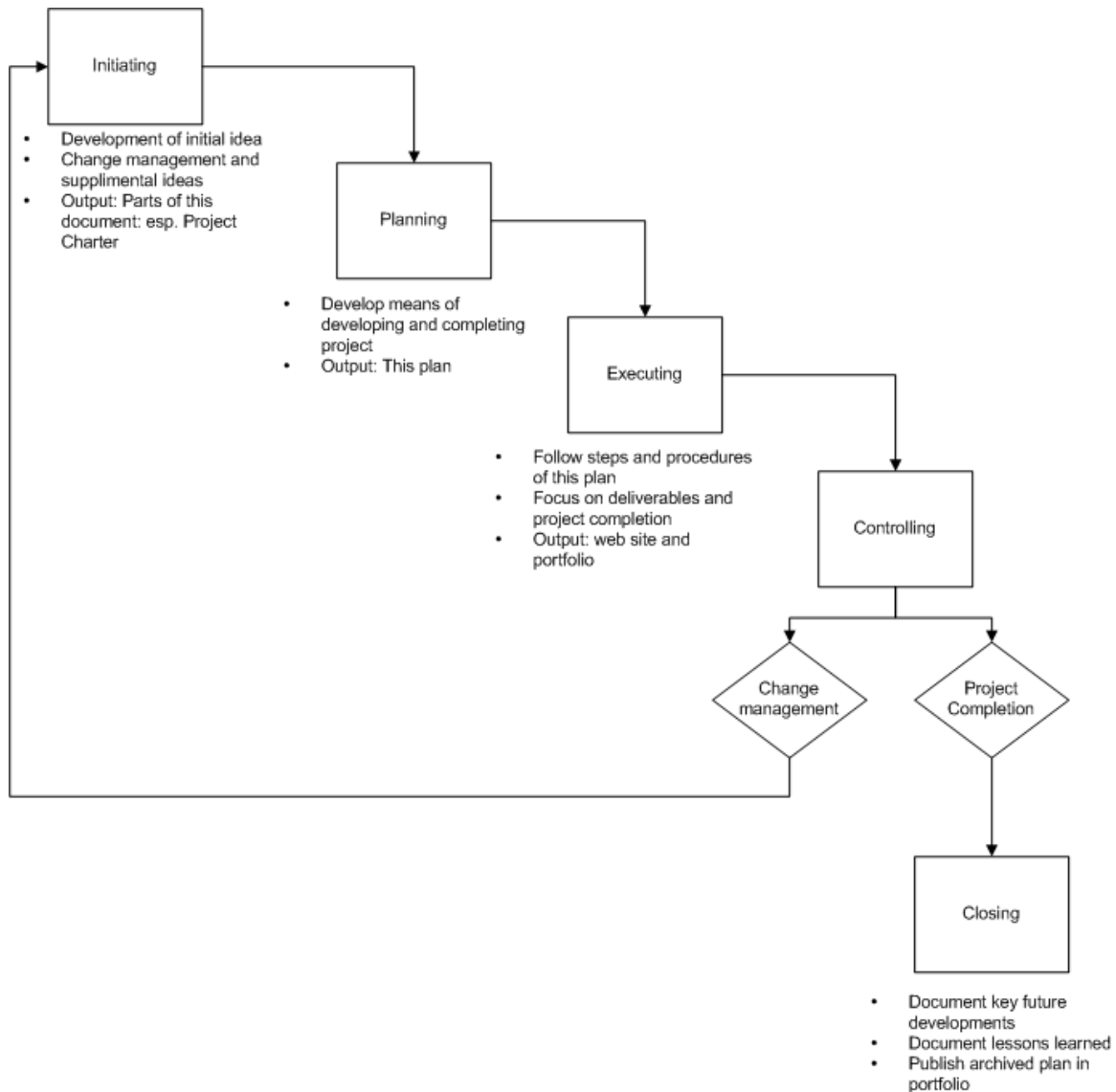


Fig. 2. Project Management Methodology Chart

Change Control Plan

This section formalizes change procedures for this project plan. Change control items are outlined below:

- Project plans are to be centralized by the MS Project file. Other documentation resources except for this project plan will be embedded within that document.
- Project procedures and change log to be embedded in controls part of project file. Procedures not included in the original plan will be indicated in a consistent manner.
- Minor changes to be logged and made in source file. Major changes will require the source file to be archived and a new version created. Version changes will also be logged in the project progress log.
- Plan documentation to be centralized in appropriate directory on the project web site. Archives will be placed in a sub-directory called archives.
- Change methodology will follow the general procedure of Progress Review, Change Assessment, Change Procedure, and Change Documentation. This procedure is outlined in the diagram below which may also be found in *Information Technology Project Management*, by Kathy Schwalbe, p. 72.

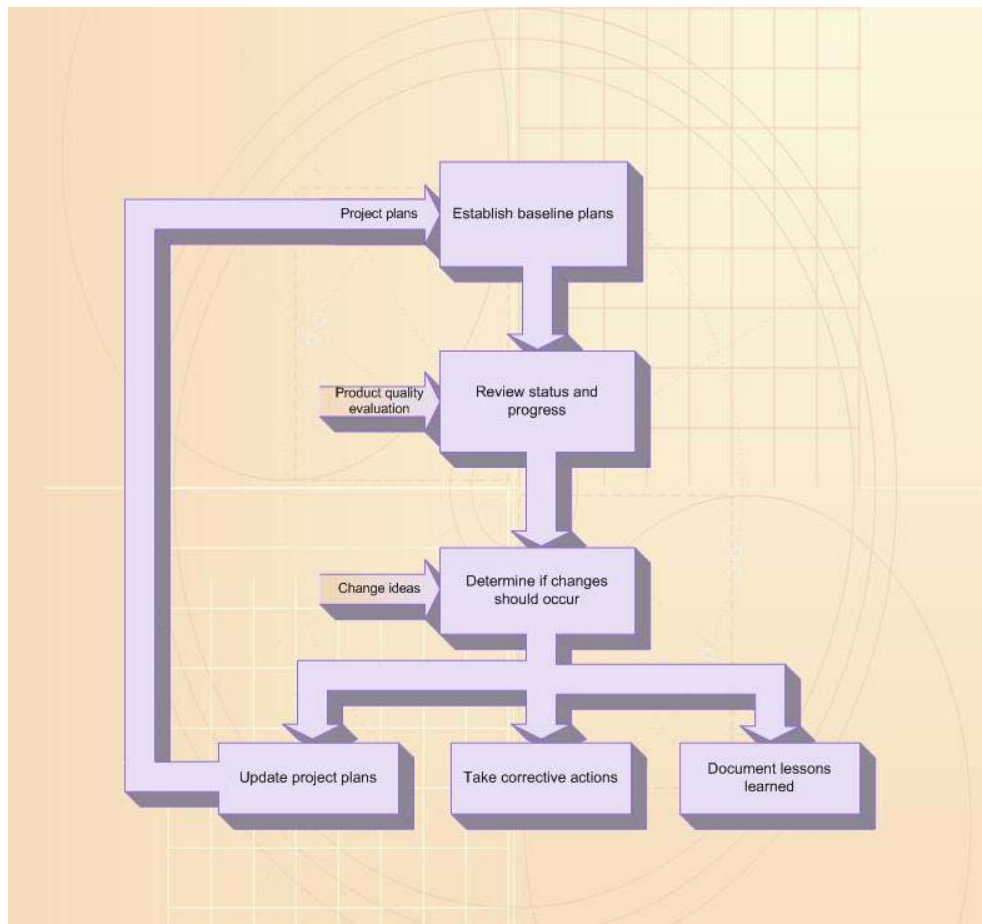


Fig. 3. Integrated Change Control Process (Adapted from Schwalbe, p. 72)

Work Breakdown Structure

The following Work Breakdown Structure is presented for accessibility and clarity. The items here correspond with items in the project Gantt chart. The Gantt chart in the MS Project file should be regarded as the official source of this information.

Task I.D.	Task Description	Duration	Start	Finish	Predecessors	Who *
1	Initiating	20.25d	4/28/03	5/26/03		
2	Project initiation email to instructor	2h	4/28/03	4/28/03		S
3	Instructor review of project idea	1w	4/29/03	5/5/03	2	J
4	Detailed project initiation proposal	1d	5/19/03	5/19/03	3	S
5	Project approved	0d	5/26/03	5/26/03	4	J
6	Develop project charter	1d	5/26/03	5/26/03	5	S
7	Charter signed	0d	5/26/03	5/26/03	6	S
8	Planning	22d	5/27/03	6/25/03		
9	Develop project plans	2w	5/27/03	6/9/03	6	S
10	Review project plans	1d	6/10/03	6/10/03	9	S
11	Submit plans for peer review	1w	6/12/03	6/18/03	10	P
12	Revise plans based on peer review	1w	6/19/03	6/25/03	11	S
13	Submit plans as final course project	0d	6/25/03	6/25/03	12	S
14	Executing	52d	5/26/03	8/5/03		
15	Analysis:	1d	6/26/03	6/26/03		
16	Review project plans	0.5d	6/26/03	6/26/03	13	S
17	Evaluate needed details not covered in plans	0.5d	6/26/03	6/26/03	16	S
18	Design:	2d	6/27/03	6/30/03		
19	Create detailed web structure map	1d	6/27/03	6/27/03	17	S
20	Create skeleton site with working links	1d	6/30/03	6/30/03	19	S
21	Implementation:	52d	5/26/03	8/5/03		
22	Build stage 1 working site	1w	7/1/03	7/7/03	20	S
23	Develop branding and logo design	3w	5/26/03	6/13/03	5	C
24	Branding review	1d	6/16/03	6/16/03	23	S
25	Web site and branding integration review	2d	7/8/03	7/9/03	22,24	S
26	Compile hardcopy portfolio resources:	5d	7/10/03	7/16/03		
27	Resume/transcript	1d	7/10/03	7/10/03	25	S
28	Review magazines for valuable articles:	4d	7/11/03	7/16/03		
29	STC Intercom	2d	7/11/03	7/14/03	27	S
30	IEEE Spectrum	2d	7/15/03	7/16/03	29	S
31	Basic system implemented	0d	7/16/03	7/16/03	30	
32	Build stage 2 working site	1w	7/17/03	7/23/03	30	S
33	Finalize branding	3w	6/17/03	7/7/03	24	C
34	Project review	2d	7/24/03	7/25/03	32,33	S
35	Build stage 3 detailed design	1w	7/28/03	8/1/03	34	S
36	Build CD Rom version of site for Portfolio	2d	8/4/03	8/5/03	35	S
37	Completed System Implemented	0d	8/5/03	8/5/03	36	S
38	Controlling	30.13d	6/26/03	8/7/03		
39-82	Log project progress daily	30.13d	6/26/03	8/7/03		S
83	Closing	2d	8/6/03	8/7/03		
84	Update project plans	1d	8/6/03	8/6/03	37	S
85	"Develop next-stage-of-development ""wish list"""	1d	8/7/03	8/7/03	84	S
86	Project completed	0d	8/7/03	8/7/03	85	S

* S = Scott Bradley, J = Jose Lepervanche, P = Class Peers, C = Caouette Design

Table 2. Work Breakdown Structure

Responsibility Assignment Matrix

Fig. 4 shows the organizational structure for resources associated with this project. The Responsibility Assignment Matrix is mapped according to this structure and to the assigned roles and responsibilities which are shown in Table 1, above on page 3. The resulting Responsibility Assignment Matrix is shown in Table 3 below. The resulting resource assignment is also shown in the final column of the Work Breakdown Structure of Table 2.

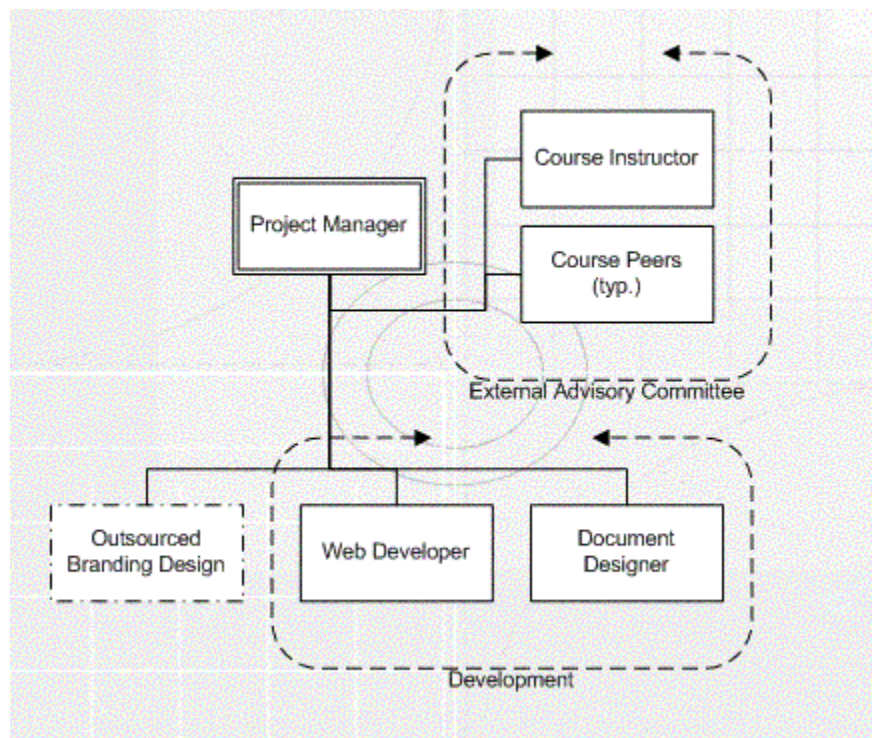


Fig. 4. Organizational Chart

WBS ID	Task Description	Project Manager	Course Instructor	Course Peers	Graphic Designer	Web Developer	Document Designer
1	Initiating	-	-	-	-	-	-
2	Proj. init. Email	R P					
3	Instr. review		R P				
4	Detailed proposal	R					P
5	Project approved		R P				
6	Dev. proj. charter	R					P
7	Charter signed	R P					
8	Planning	-	-	-	-	-	-
9	Dev. proj. plans	R					P
10	Review proj. plans	R P					
11	Peer review	R		P			
12	Revise plans	R					P
13	Submit plans - final	R P					
14	Executing	-	-	-	-	-	-
15	Analysis:	-	-	-	-	-	-
16	Review plans	R P					
17	Eval. details	R				P	P
18	Design:	-	-	-	-	-	-
19	Web map	R				P	
20	Skeleton site					R P	
21	Implementation:	-	-	-	-	-	-
22	Stage 1 build					R P	
23	Branding design	R			R P		
24	Branding review	R P					
25	Brand. Integration	R				R P	
26	Compile portfolio:	-	-	-	-	-	-
27	Resume/transcr.						R P
28	Review magazines:	-	-	-	-	-	-
29	STC Intercom						R P
30	IEEE Spectrum						R P
31	Basic sys. Impl.	-	-	-	-	-	-
32	Stage 2 build					R P	
33	Finalize branding	R			R P		
34	Proj. review	R P					
35	Stage 3 build					R P	
36	CD Rom build					R P	
37	Sys. Complete	-	-	-	-	-	-
38	Controlling	-	-	-	-	-	-
39-82	Log progress daily	R P				P	P
83	Closing	-	-	-	-	-	-
84	Update plans	R					R P
85	Next-stage plans	R P					
86	Proj. complete	-	-	-	-	-	-

R = Responsible organizational unit, P = Performing organizational unit

Table 3. Responsibility Assignment Matrix

Note that, due to multiple assignments of resources within the organizational structure, any changes of assignment of responsibility should be mapped through the Responsibility Assignment Matrix before being applied to the Work Breakdown Structure. This will ensure an accurate reflection of responsibility changes within the organizational structure. For example, should a web developer be hired to supplement current resources, the change cannot be made simply by changing the “S” assignments in the final column of the WBS. Rather, the new designer would take on the responsibilities indicated by the “Web Developer” column of the Responsibility Matrix, and only the corresponding task items for which the Web Developer is a performing organizational unit would be updated in the Work Breakdown Structure. Namely, for this example, those items would be task numbers 17, 19, 20, 22, 25, 32, 35, 36, and 39-82 according to the “Web Developer” column of Table 3.

Risk Assessment Plan

This section answers the following questions regarding project risk: Why, What, How, Who, When, and How much?

Why is it important to take this risk? This project is an important step toward developing a means of presenting business capabilities to clients. Because the related business is technical communications, it is imperative that the products developed in this project be of the highest quality and be readily presentable to potential clients as this initial form of communication will provide the initial impression of what the client ought to expect with future deliverables.

What is the specific risk? The most important risk involved in the completion of this project is that of not completing the project at all. The outcome of this project determines the potential for future business in technical communications on a consulting basis and as a promotional tool is the basis for securing any future business at all. Thus the greatest risk factor is not completing the project.

How will the risk be mitigated? Mitigation of the primary risk factor will occur through the process of actual completion of the project. This will require careful management of project scope and managed prioritization of project elements within the scope. Risk mitigation will primarily occur through detailed planning of the project which occurs in this document.

Who is responsible for implementation of this risk management plan? As an independent project for the consultancy of Scott Bradley, Scott will assume full responsibility of risks involved and management of the project and its risks.

When will the milestones associated with the mitigation approach occur? Since the primary risk for this project is the lack of project delivery, the associated risk will follow a trajectory of decreasing significance as the project proceeds. The most significant milestone will be the completion of Stage 1 of the online portfolio. This stage of completion will present a usable portfolio that will need only to be further developed and polished through stages 2 and 3.

How much is required in terms of resources to mitigate risk? The primary resource to be consumed through the development of this project is time. For this reason, combined with the significance of stage 1 delivery, the time allocated to stage 1 development will be considered most valuable to project completion and successful risk management. Stage 2 and 3 development will still be valuable to project delivery, but since the stage 1 product is expected to be a presentable product those latter stages will be less crucial to risk mitigation. The result is that a minimum of one full week of dedicated work will be planned for the completion of stage 1 development.

Schedule

The chart on the following pages presents the proposed project schedule.

Schedule Contents

Dates	page
4/27 – 5/14	14
5/15 – 6/1	15
6/2 – 6/19	16
6/20 – 7/7	17
7/8 – 7/25	18
7/26 – 8/7	19

[illegible]

	5/15	5/16	5/17	5/18	5/19	5/20	5/21	5/22	5/23	5/24	5/25	5/26	5/27	5/28	5/29	5/30	5/31	6/1
Scott Bradley Project initiation email to instructor Detailed project initiation proposal Develop project charter Charter signed Develop project plans Review project plans Revise plans based on peer review Submit plans as final course project Review project plans Evaluate needed details not covered in plans Create detailed web structure map Create skeleton site with working links Build stage 1 working site Branding review Web site and branding integration review Resume/transcript STC Intercom IEEE Spectrum Build stage 2 working site Project review Build stage 3 detailed design Build CD Rom version of site for Portfolio Completed System Implemented Log project progress daily Update project plans Develop next-stage-of-development "wish list" Project completed					8 hrs 8 hrs							8 hrs 8 hrs	8 hrs 8 hrs	8 hrs 8 hrs	8 hrs 8 hrs	8 hrs 8 hrs		
Jose Lepervanche Instructor review of project idea Project approved																		
Class peers Submit plans for peer review																		
Caouette Design Develop branding and logo design Finalize branding												8 hrs 8 hrs	8 hrs 8 hrs	8 hrs 8 hrs	8 hrs 8 hrs	8 hrs 8 hrs		

Who Does What When as of Thu 6/12/03
final project

	6/2	6/3	6/4	6/5	6/6	6/7	6/8	6/9	6/10	6/11	6/12	6/13	6/14	6/15	6/16	6/17	6/18	6/19
Scott Bradley	8 hrs	8 hrs	8 hrs	8 hrs	8 hrs	8 hrs		8 hrs	8 hrs						8 hrs			8 hrs
Project initiation email to instructor Detailed project initiation proposal Develop project charter Charter signed Develop project plans Review project plans Revise plans based on peer review Submit plans as final course project Review project plans Evaluate needed details not covered in plans Create detailed web structure map Create skeleton site with working links Build stage 1 working site Branding review Web site and branding integration review Resume/transcript STC Intercom IEEE Spectrum Build stage 2 working site Project review Build stage 3 detailed design Build CD Rom version of site for Portfolio Completed System Implemented Log project progress daily Update project plans Develop next-stage-of-development "wish list" Project completed	8 hrs	8 hrs	8 hrs	8 hrs	8 hrs	8 hrs		8 hrs	8 hrs						8 hrs			8 hrs
Jose Lepervanche																		
Instructor review of project idea Project approved																		
Class peers											8 hrs	8 hrs			8 hrs	8 hrs	8 hrs	
Submit plans for peer review											8 hrs	8 hrs			8 hrs	8 hrs	8 hrs	
Caouette Design	8 hrs	8 hrs	8 hrs	8 hrs	8 hrs	8 hrs		8 hrs	8 hrs	8 hrs	8 hrs	8 hrs				8 hrs	8 hrs	8 hrs
Develop branding and logo design	8 hrs	8 hrs	8 hrs	8 hrs	8 hrs	8 hrs		8 hrs	8 hrs	8 hrs	8 hrs	8 hrs				8 hrs	8 hrs	8 hrs
Finalize branding																8 hrs	8 hrs	8 hrs

	6/20	6/21	6/22	6/23	6/24	6/25	6/26	6/27	6/28	6/29	6/30	7/1	7/2	7/3	7/4	7/5	7/6	7/7
Scott Bradley	8 hrs			8 hrs	8 hrs	8 hrs	16 hrs	16 hrs			16 hrs	16 hrs	16 hrs	16 hrs	16 hrs			16 hrs
Project initiation email to instructor																		
Detailed project initiation proposal																		
Develop project charter																		
Charter signed																		
Develop project plans																		
Review project plans																		
Revise plans based on peer review	8 hrs			8 hrs	8 hrs	8 hrs												
Submit plans as final course project																		
Review project plans																		
Evaluate needed details not covered in plans																		
Create detailed web structure map							4 hrs											
Create skeleton site with working links							4 hrs											
Build stage 1 working site								8 hrs										
Branding review																		
Web site and branding integration review																		
Resume/transcript																		
STC Intercom																		
IEEE Spectrum																		
Build stage 2 working site																		
Project review																		
Build stage 3 detailed design																		
Build CD Rom version of site for Portfolio																		
Completed System Implemented																		
Log project progress daily																		
Update project plans																		
Develop next-stage-of-development "wish list"																		
Project completed							8 hrs	8 hrs			8 hrs	8 hrs	8 hrs	8 hrs	8 hrs			8 hrs
Jose Lepervanche																		
Instructor review of project idea																		
Project approved																		
Class peers																		
Submit plans for peer review																		
Caouette Design	8 hrs			8 hrs	8 hrs	8 hrs	8 hrs	8 hrs			8 hrs	8 hrs	8 hrs	8 hrs	8 hrs			8 hrs
Develop branding and logo design																		
Finalize branding	8 hrs			8 hrs	8 hrs	8 hrs	8 hrs	8 hrs			8 hrs	8 hrs	8 hrs	8 hrs	8 hrs			8 hrs

[illegible]

Who Does What When as of Thu 6/12/03
final project

[illegible]

Project Budget

The following items are identified as primary budget concerns:

- Logo/branding design work (outsourced)
- Project execution resource personnel
- Portfolio materials
 - Portfolio notebook
 - Dividers
 - Writable CDs
 - Paper
 - Toner
- Web resources
- Software

Of these primary cost concerns, the first two are labor concerns which will be included in the Microsoft Project file. Branding outsourcing will come from Caouette Design, and will be charged at \$20/hour. Other resources for project execution include charged and not charged resources. Resources from the Capella Course TS7020 will not be charged as their value has been included in the cost of the course. The primary resource, being Scott Bradley, both project manager and primary project executor, will be charged only at an opportunity cost for the purpose of a complete set of records for this project. That opportunity cost will be valued at \$50/hour.

Materials will all come from materials on hand and materials of cost that has been absorbed into the cost of the TS7020 class (such as needed software). Thus, the remaining items above do not significantly affect the overall project budget. The budget report from the MS Project file is included on the following pages.

Cost/Benefit Analysis

The actual costs of this project are very small, and are in fact overstated in the project budget that is presented below. As indicated above, the overriding cost of this project is determined by opportunity cost. But, there is in return an immeasurable opportunity cost for not completing this project. The cost of not completing this project is the potential of an entire business. Thus, the cost/benefit analysis comes quite simply to this: The only real significant cost associated with this project is the cost of not completing and delivering the project. That cost, while not truly quantifiable, will be significant as it would be the sum of all lost contracts due to lack of proper business promotion.

ID	Task Name	Fixed Cost	Fixed Cost Accrual	Total Cost	Baseline	Variance
9	Develop project plans	\$0.00	Prorated	\$4,000.00	\$0.00	\$4,000.00
23	Develop branding and logo design	\$0.00	Prorated	\$2,400.00	\$0.00	\$2,400.00
33	Finalize branding	\$0.00	Prorated	\$2,400.00	\$0.00	\$2,400.00
12	Revise plans based on peer review	\$0.00	Prorated	\$2,000.00	\$0.00	\$2,000.00
22	Build stage 1 working site	\$0.00	Prorated	\$2,000.00	\$0.00	\$2,000.00
32	Build stage 2 working site	\$0.00	Prorated	\$2,000.00	\$0.00	\$2,000.00
35	Build stage 3 detailed design	\$0.00	Prorated	\$2,000.00	\$0.00	\$2,000.00
25	Web site and branding integration rev	\$0.00	Prorated	\$800.00	\$0.00	\$800.00
29	STC Intercom	\$0.00	Prorated	\$800.00	\$0.00	\$800.00
30	IEEE Spectrum	\$0.00	Prorated	\$800.00	\$0.00	\$800.00
34	Project review	\$0.00	Prorated	\$800.00	\$0.00	\$800.00
36	Build CD Rom version of site for Portf	\$0.00	Prorated	\$800.00	\$0.00	\$800.00
4	Detailed project initiation proposal	\$0.00	Prorated	\$400.00	\$0.00	\$400.00
6	Develop project charter	\$0.00	Prorated	\$400.00	\$0.00	\$400.00
10	Review project plans	\$0.00	Prorated	\$400.00	\$0.00	\$400.00
19	Create detailed web structure map	\$0.00	Prorated	\$400.00	\$0.00	\$400.00
20	Create skeleton site with working link:	\$0.00	Prorated	\$400.00	\$0.00	\$400.00
24	Branding review	\$0.00	Prorated	\$400.00	\$0.00	\$400.00
27	Resume/transcript	\$0.00	Prorated	\$400.00	\$0.00	\$400.00
84	Update project plans	\$0.00	Prorated	\$400.00	\$0.00	\$400.00
85	Develop next-stage-of-development "	\$0.00	Prorated	\$400.00	\$0.00	\$400.00
16	Review project plans	\$0.00	Prorated	\$200.00	\$0.00	\$200.00
17	Evaluate needed details not covered i	\$0.00	Prorated	\$200.00	\$0.00	\$200.00
2	Project initiation email to instructor	\$0.00	Prorated	\$100.00	\$0.00	\$100.00
3	Instructor review of project idea	\$0.00	Prorated	\$0.00	\$0.00	\$0.00
5	Project approved	\$0.00	Prorated	\$0.00	\$0.00	\$0.00
7	Charter signed	\$0.00	Prorated	\$0.00	\$0.00	\$0.00
11	Submit plans for peer review	\$0.00	Prorated	\$0.00	\$0.00	\$0.00
13	Submit plans as final course project	\$0.00	Prorated	\$0.00	\$0.00	\$0.00
31	Basic system implemented	\$0.00	Prorated	\$0.00	\$0.00	\$0.00
37	Completed System Implemented	\$0.00	Prorated	\$0.00	\$0.00	\$0.00
86	Project completed	\$0.00	Prorated	\$0.00	\$0.00	\$0.00
		\$0.00		\$24,900.00	\$0.00	\$24,900.00

Budget Report as of Thu 6/12/03
final project

[illegible]

Project Closing Procedures

Basic procedures for project closing are outlined below:

1. Identify and prioritize key future developments for the future planning of Portfolio enhancement projects. Some items to consider follow:
 - New multimedia materials to be developed
 - Define further document and communication types which might fall under service categories
 - Specific documents and samples to be developed for portfolio
 - Further portfolio samples to be gleaned from past work
2. Document lessons learned. Examples of lessons to be considered follow:
 - Unforeseen causes of project delay
 - Unplanned project costs
 - Thoughts on how project could have been executed more efficiently
 - Notes on reliability and satisfaction with outside resources
 - Further notes on particular talents and skills of resources that were a benefit to the project
3. Finalize testing and quality assurance of project deliverables. Due to the simple nature of this project, most testing and quality assurance will be inherent to the development of the project without independent verification. For this reason, a final run-through of web site functionality and overall project quality is necessary. Basic run-through testing should include the following:
 - All links on web published site are functional
 - All offline links on CD Rom version are functional
 - All portfolio examples are complete and functional
 - Layout appears professional and works for screen resolutions as low as 800x600
4. Publish completed project planning files as part of the online portfolio. Plans should be up-to-date with closing documentation included. Publication will require a link in the appropriate part of the web site in order to present the project plan as a viewable part of the online portfolio.