Outline

• **Management Systems (MS) Overview**
  • How MS are Defined at SLAC
  • MS Value
  • What makes up a MS

• **SLAC’s MS Project**
  • MS Owners
  • Deliverables and Schedule
    • Pilot
    • MS/MS Subsystem Plan Formats

• **Next Steps**
• **Discussion**
A simple definition of a Management System

A management system is the means by which a product or service is delivered to the user

And the focus should be on the USERs!
The Value of Management Systems?

• Allow your customers and users to efficiently and effectively access your services
  – Efficient systems cost less to operate
• Align support functions to serve the mission
• Document what we do and how we do it
• Improve measurement and budget control
• Maintain configuration control of your processes
• Adhere to requirements (contract and policy)
• Support Contractor Assurance

When taken together, these reasons auger for an integrated, web-based, and new approach to documenting your services and processes
Management Systems answer the Question?

• How do I:
  • Get approval to submit a proposal to DOE or other sponsors? Submit my final report?
  • Get an experiment approved?
  • Take a trip?
  • Modify my lab?
  • Manage my project?
  • Respond to a media inquiry?
  • Procure goods and services?
  • Hire a new staff member?
  • And many, many, many more…
Basic elements of a Management System

Constraints
--Legal
--Contracts
--Policy

Inputs
--Forms
--Data
--Reports

Process

Outputs
--Forms
--Data
--Reports

Resources
--Funding
--Staff
--Suppliers

A Management System Description (MSD) details all of these elements
It’s the interconnections between MSs that need managed to produce value!

A change in one MS causes a ripple effect in many others

An integrated system allows you to maintain configuration control
The initial list of Management Systems and the MSOs

<table>
<thead>
<tr>
<th>Management System</th>
<th>Management System Owner (MSO)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ES&amp;H</td>
<td>Jim Tarpinian</td>
</tr>
<tr>
<td>Computing &amp; IT Services</td>
<td>James Williams</td>
</tr>
<tr>
<td>Facilities Management</td>
<td>Matt Wrona</td>
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<tr>
<td>Financial Services</td>
<td>Linda Rakow</td>
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<tr>
<td>Supply Chain Management</td>
<td>Sherrie Schaufele</td>
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<tr>
<td>Human Resources</td>
<td>Larry Young</td>
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<td>Communications</td>
<td>Farnaz Khadem</td>
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<td>Project Management</td>
<td>Liz Dahlen</td>
</tr>
<tr>
<td>Controlled Document Mgmt</td>
<td>Rick Rence</td>
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<tr>
<td>Legal Services</td>
<td>Steve Porter</td>
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<td>Performance Management</td>
<td>Craig Ferguson</td>
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<tr>
<td>Conduct of Research</td>
<td>Keith Hodgson</td>
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<td>Engineering Services</td>
<td>Karen Fant</td>
</tr>
<tr>
<td>User Facilities</td>
<td>Cathy Knotts</td>
</tr>
</tbody>
</table>
# Phased Approach

## FY12 – Phase 1
- **Phase 1A, MS Preparation, Pilot**
  - ID 4 Pilot MS Owners
  - Develop M/Subsystem Descriptions and template for use by all MSOs
  - Develop Sample List of HDI questions/criteria
    -- By 15 Jun 12

- **Phase 1B, MS Prep, MS Owners**
  - Develop MS/Sub. Description
  - Include MS requirements in FY 13 Budget submittals
  - ID HDI questions

- **ID ‘web site’ to house MS**
  - New DMS on SP 2010

- **P1 - Deliverables: 30 Sep 12**
  - MS/Subsystem Descriptions
  - HDI Questions
  - ID Document Repository
    --- DMS deployed in CY 2013

## FY13 – Phase 2
- **Phase 2A, Policies, Procedures, HDI Development**
  - Post current Policies/Procedures
    -- Approval Process IAW DMS
  - Remove outdated information
  - Migrate to new DMS
    - By: 30 Jun 13
  - HDI Process Flows
    - Pilot: 31 Dec 12
    - All: 30 Sep 13

- **Phase 2B, IT Planning**
  - Architecture/Framework
    -- HW/SW Requirements
  - ID Search Engine
  - Resource Planning
  - Assign IT Project Mgr
  - Develop P3 Project Plan
    - By: 30 Jun 13

- **P2 - Deliverables:**
  - Policies in DMS (30 Jun 13)
  - IT Project Plan (30 Jun 13)
  - HDI Process Maps (30 Sep 13)

## FY14 – Phase 3
- **Phase 3, Go live - MS**
  - Execute IT Project Plan
  - Fully integrated, interconnected web based, customer focused Management Systems
  -- Robust to Subsystem Level
  -- Includes “HDI” functionality
  -- Information housed in DMS
  - Use Pilot beginning in late FY 13 for select MS HDI

- **P -3 Deliverable:**
  - Deployed MS (30 Sep 14)
    -- Pilot (31 Mar 13)
    -- All: 30 Sep 13
Deliverable – Document Repository

• Document Management System
  – FY 13 Delivered Project
  – Tied to Sharepoint 2010
  – Availability: Early 2Q, FY 13
  – Plan: WBS Structure
  – Plan: Document Approval by WBS/MS Owner
Next Steps

• Pilot Outbrief
  – MS and Subsystem Plan Formats
  – HDI Questions

• Begin expanded Phase 1 all MS Owners
  – MS & MS Subsystem Plans
  – Initial List of HDI Questions
    • Allow IT to Develop Project Plans
  – Begin Discussions with IT
Pilot Deliverable: MS Plan Format

• **Required:** Plans at MS and Subsystem Levels

• **MS Major Headings:**
  – 1.0 Purpose
  – 2.0 Operation
    • 2.1 Overview
    • 2.2 Sub-Systems
  – 3.0 Roles, Responsibilities, Accountabilities
  – 4.0 Performance, Assessment, and Continuous Improvement
  – 5.0 Associated Resources and References
  – 6.0 Definitions
  – 7.0 MS Costs (Reserved)
Pilot Deliverable: MS Subsystem Plan Format

• **MS Subsystem Major Headings:**
  - 1.0 Purpose
  - 2.0 Operation
    - 2.1 Overview
  - 3.0 Roles, Responsibilities, Accountabilities
  - 4.0 Key Processes, Interactions, Requirements and Performance Measures
  - 5.0 Performance, Assessment, and Continuous Improvement
  - 6.0 Associated Resources and References
  - 7.0 Definitions
  - 7.0 MS Subsystem Costs (Reserved)