Midpeninsula Regional Open Space District Creates a Project Management System to Fit Its Needs

By Stefan Jaskulak and Marion Shaw

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Midpeninsula Regional Open Space District made a commitment to the public in 2014 to accelerate land acquisition, environmental restoration, and public access within the district. A $300 million bond measure provided funding to deliver on committed acquisition, restoration, and public access, and brought with it the need to expand the organization's capacity and capabilities to deliver projects. At the time, Midpeninsula Regional Open Space District (Midpen) didn't have a project management tool to support complex and multi-year projects spanning multiple departments, so it created Project Central to bring together project information, enabling staff across the organization to manage and access project activities, status, and documents. Project Central's project dashboards facilitate project status meetings, and robust search features deliver information on demand.

To deliver on its vision and commitments to constituents, Midpen's board of directors directed staff to invest in new infrastructure to centralize documentation, improve communications, and build up reliable scalable technology to connect staff anywhere. The infrastructure improvement initiative had several components (see Exhibit 1):
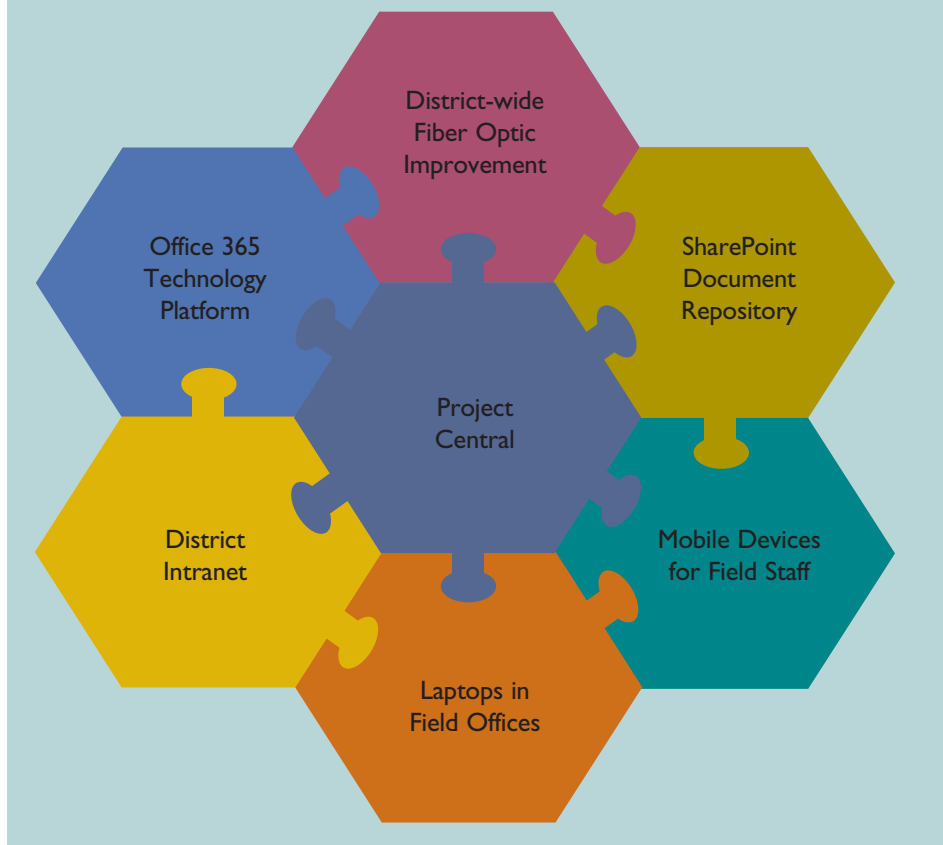
- Project Central, a unified platform for project status, documentation, and financials.

- SharePoint document repository, providing a foundation for intranet and project management using document management and collaboration that's integrated with Office 365.

- District-wide fiber optic improvements to increase network bandwidth, connectivity, and redundancy for electronic communications.

- District intranet for scalable, efficient information-sharing across departments.

- Office 365 technology platform to standardize office productivity tools, host systems and data in the cloud for secure access everywhere, and enable reliable, cost-effective backup services.

- Mobile devices for field staff for remote asset and incident data collection.

- Laptops in ranger vehicles, allowing connectivity and communication for field staff.

TIME FOR A CHANGE

Midpen had decided to address the changing needs of the organization, evaluating its structure, capacity, and financial sustainability. The resulting Financial and Operational Sustainability Model report provided recommendations guided the organization in delivering on its commitment to the public, in part through recommended improvements in project planning and delivery. Two key

Exhibit 1: The Components of Midpen's Infrastructure Improvement Initiative

security, issue tracking, tasks, timelines, and financial reports.

The project dashboard page includes a communication timeline with key activities, milestones, and progress. Project documents are tagged by project, type, and other categories, and they can be searched across the Midpen intranet or within the context of a project library.

Project Central makes use of Midpen's MS Office 365 standard technology platform, integrating with user management and document management tools. The MS Office 365 platform supports online collaboration across commonly used document types. It provides key project information at a glance, links to additional project information, and provides information transparency and consistency that supports cross-functional collaboration as well as communication with the board and the public.

recommendations were to implement a new project delivery approach and a project management system to improve management and reporting of project schedules, budgets, milestones, and other project details.

A change was needed because the organization's district project managers had been using Microsoft tools to track and present their projects. Responding to inquiries required significant time spent collecting and aggregating information from various sources. The organization needed a strategic tool to support consistent and repeatable project management practices across Midpen.

The Financial and Operational Sustainability Model Report recommended that the organization "con-

vene internal stakeholders to develop a refined, comprehensive project delivery approach that ensures proper oversight, clarity of roles, prioritization, predictability, and follow-through," and "complete a comprehensive requirements analysis and establish a plan to procure and implement a uniform project management system."

THE SOLUTION

The project sites now assemble all the resources related to a project in one location, the SharePoint platform, which provides search and security features, as well as configurable building blocks, or web parts, to tailor the sites as needed. Project Central sites support document management, collaboration,

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Project Central's technology foundation is SharePoint, which also supports Midpen's intranet, department sites, and content management and document retention strategy. (See Exhibit 2.) Using this common platform reduces the complexity of implementation, training, and maintenance for the solution.

Exhibit 2: The Midpen Intranet Page
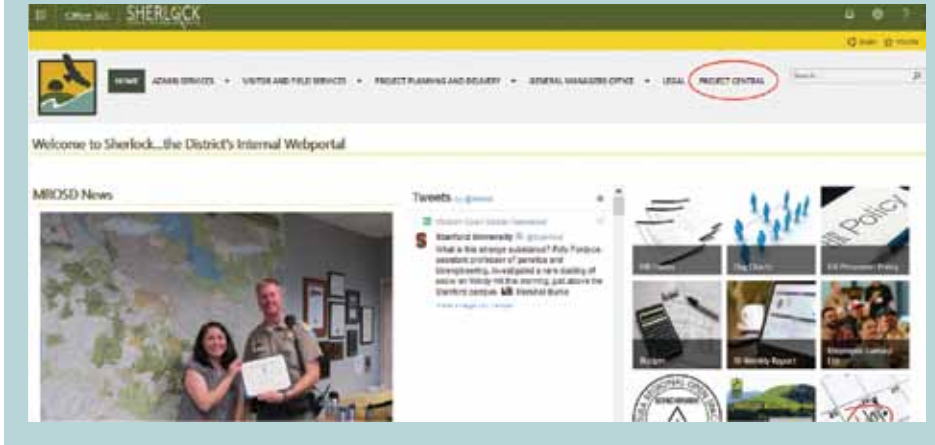
The Project Central home page lists all active projects and offers filters to quickly refine the list or find specific projects. SharePoint search features enable search based on keywords or by filter fields. Staff can view selected project information in the search results list or open a project site for more details.

In addition, the Project Central home page includes links to dashboards for each department. (See Exhibit 3.)

The department dashboard pages show status and summary details for each project led by the department. Department dashboard pages are key to facilitating productive status meetings.

PROJECT DASHBOARDS

The project dashboard page is opened from either the Project Central home page or a department dashboard page, to show key project information at a glance. (See Exhibit 4.) Project dashboard pages show project status and links to additional details. (See Exhibit 5.)

The project dashboard page shows the project name, project summary, and current fiscal year scope. It also includes key project details:

- **Timeline.** A simple timeline shows major project phases, milestones, and deadlines. The timeline is intended to contextualize current activities for stakeholder communications.

- **Documents.** The project document repository holds all project-related documents. It may also contain a richer project work plan than the dashboard timeline, if needed, for managing tasks, resources, and dependencies.

- **Status.** Project status is assessed via red, orange, or green indicators by budget, schedule, issues, and overall project health. The status summary also shows the latest update date, percent complete, and brief status notes.

- **Notes.** Working notes can be captured in Microsoft OneNote, which is embedded in the project site and supports flexible note-capture, organization, and sharing.

- **Team.** The project team lists the roles and contact information for internal and external stakeholders.

- **Issues.** The issues list captures active and closed project issues, which may affect project delivery status.

- **Budget.** A current project budget report is linked to each project site, enabling staff to view the project budget, encumbrances, and fiscal year-to-date spending. (See Exhibit 6.)
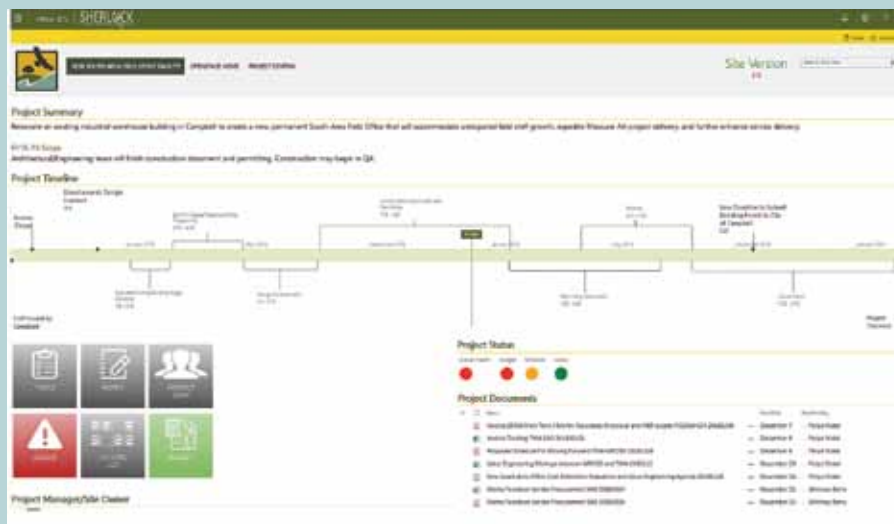
Exhibit 3: The Midpen Project Central Home Page
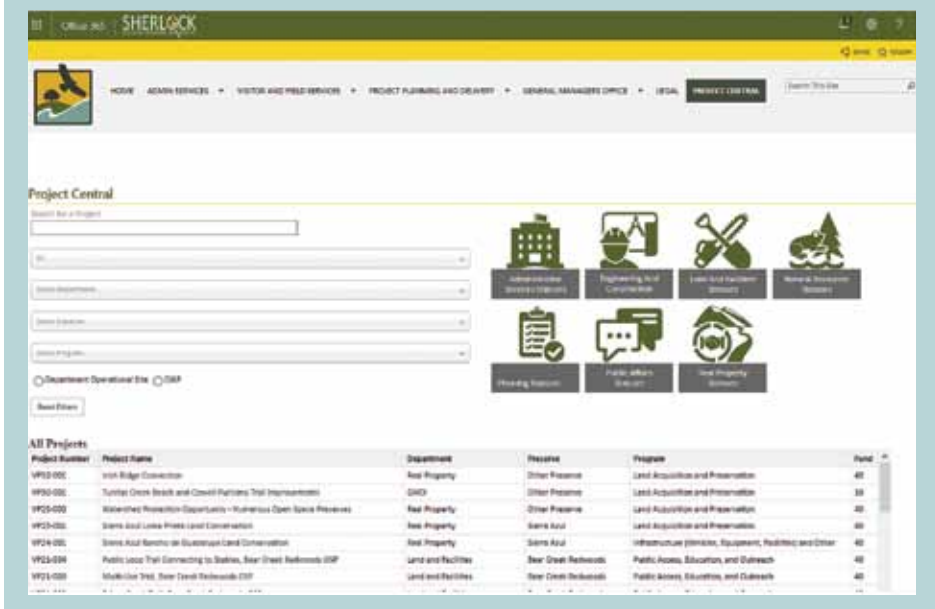
Exhibit 4: One of Midpen's Department Dashboard Pages

Exhibit 5: Project Dashboard Pages Showing Status and Links

> Project managers present project status updates to management directly from the project details in Project Central, and management reports key project updates to the executive team.

Project managers present project status updates to their management directly from the project details in Project Central, and management reports key project updates to the executive team, again referring directly to the project details in Project Central. All Midpen staff can view project sites and project documentation. Staff can search for project documents from the Midpen intranet site, from Project Central, or within a Project Central project site. The general manager, management, and executive team attend Project Management Office (PMO) meetings once a month to review and discuss projects that require attention.

IMPLEMENTATION

Midpen's Information Services and Technology Department oversaw the implementation and rollout, and gath-

The Midpeninsula Regional Open Space District was founded in 1972 as an independent special district to preserve the regional greenbelt in northwestern Santa Clara County, California. The voters expanded Midpen in 1976 to include southern San Mateo County and again in 1992, to add a small portion of Santa Cruz County. In 2004, through the Coastside Protection Program, Midpen's boundary was extended to the Pacific Ocean in San Mateo County. In June 2014, voters approved Measure AA, a $300 million general obligation bond tasking the Midpeninsula Regional Open Space District to:

- Protect natural open space lands — open preserves or areas of preserves that are currently closed.

- Construct public access improvements such as new trails and staging areas.

- Restore and enhance open space land, which includes forests, streams, watersheds, and coastal ranch areas.

Exhibit 6: Project Financial Report

Project financial reports, linked to the project dashboard, are refreshed nightly.

| FY2018-19 Project Budget & Expenditures | Report Produced: 2/6/2019 | | | | | |

Project/Departments/Accounts	Amended Budget	Encumbrances	Actual Spend	Actual With Encumbrances	Remaining after Spend & Encumbrances	Percentage Spent & Encumbered
31601	857,600	98,034	120,847	218,881	638,720	26%
20 RP						
10-20-230-7301 - Property Taxes	0	0	0	0	0	
40-20-230 8201.07 - Site Engineering	0	0	3,600	3,600	(3,600)	
20 RP Total	0	0	3,600	3,600	(3,600)	
35 Engineering & Construction						
40-35-325-8201 - ARCHITECT/ENGINEERING SERVS	240,000	0	0	0	240,000	0%
40-35-325-8201.01 - Architect/Landscape Architect	0	98,034	106,967	205,000	(205,000)	
40-35-325-8201.02 - Civil Engineer	0	0	8,050	8,050	(8,050)	
40-35-325-8204 - PERMITTING FEES	36,000	0	0	0	36,000	0%
40-35-325-8204.01 - Local (County/City)	0	0	2,231	2,231	(2,231)	
40-35-325-8205 - CONSTRUCTION	575,000	0	0	0	575,000	0%
35 Engineering & Construction Total	857,600	98,034	117,247	215,281	642,320	25%
Grand Total	857,600	98,034	120,847	218,881	638,720	26%

ering input and feedback from key staff. A SharePoint architect position was created to implement and support Project Central, the district Intranet, and document management, which all run on the same platform. Project Central makes use of Microsoft's document management, search functionality, and standard "web parts" to build project lists, filters, and project dashboard page features.

The first step and biggest hurdle in implementing new enterprise solutions always lies in defining the business processes and gaining executive sponsorship. Midpen's solution — using Microsoft's SharePoint platform — worked so well for the organization because it already used Microsoft Office products and didn't require real-time, complex project performance metrics. ▌

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