

Project Charter



Project authorized by Beckie Benson on October 21, 2021

I. Project Name

Project Name Adobe Sign Implementation Project	Start Date 07/29/2021	End Date 02/28/2022
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II. Project Organization

Indicate all project team members and how frequently you will communicate with them.

<p>Project Manager <i>Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives</i></p> <ul style="list-style-type: none"> Reesa Fickett Candace Wong, Project Management Asst 	<p>Sponsor <i>The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project</i></p> <ul style="list-style-type: none"> Beckie Benson, EA Executive Director
<p>Steering Committee <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <i>Key people that assist the project manager in making decisions and moving the project forward</i> <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed</p> <ul style="list-style-type: none"> Andi Loree, Bus Svc Bill Dowler, HR TBD, LLS Erika Montgomery, JCCS Shauna Stark, Applications 	<p>Stakeholders <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <i>An individual, group, or organization that may affect or be affected by outcome of the project</i> <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed</p> <ul style="list-style-type: none"> All SDCOE employees Customers of SDCOE Form owners from each division Group Admins for each group
<p>Project Team <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <i>Supports the project manager in performing work of the project to achieve its objectives</i> <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed</p> <ul style="list-style-type: none"> App Dev Team: Uyen Quach, Haison Tran, Ivan Constantino, Ruaa Matti Juan Pablo Rodriguez for Adobe Sign Console, SSO sync errors Tyler Petro for SSO and licensing Support Team (Group Admins, Form Owners, CSS, App Dev) 	<p>Others Involved <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <i>List anyone else who will be involved and state their roles</i> <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed</p> <ul style="list-style-type: none"> Stacy Brandt for communications Tammy's team for videos Legal Department for consultation AdobeSign partner/professional services

III. Project Details

<p>Project Description <i>Write a brief description of this project in simple, easy-to-understand terms. What are you trying to accomplish? Why?</i></p> <p>Imagine a day when SDCOE employees can sign documents electronically from anywhere, with no need for physical routing, which can be slow and cumbersome. Imagine the system is easy to use, convenient, fast and secure. Visualize your documents being processed faster, more efficiently, and that you have visibility to where your documents are in the workflow. This purpose of this project is to implement Adobe Sign across SDCOE for electronic signatures. The work will be divided into three phases to allow us to convert our forms, train Form Owners and Group Admins, train end users, and implement a workflow for nearly 300 existing forms.</p>
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Scope

Who/how many this will impact? What is included (or not included) that can help manage expectations?

- All SDCOE divisions receive their digitized form templates delivered in Adobe Sign
- **Phase 1:**
 - Convert all of the forms from each division into templates in 3 waves:
 - Wave 1: HR and ITS (HR on their own and Professional Services)
 - Wave 2: Business Services and Administration (Professional Services)
 - Wave 3: LLS, SSP, JCCS (Professional Services)
 - QA of forms by Project Team members (e.g., Best Practice & Use)
 - UAT of forms by Form Owners and Power Users with AppDev
 - Training for Group Admins and Form Owners in how to manage their forms
 - Create Training Guides, Tools, and Videos
 - Training for end users in how to sign form using Adobe Sign
 - Identify templates that are candidates for webforms
 - Integration with Outlook and Teams (pilot with AppDev and EPMO)
- **Phase 2:**
 - Implement workflow for forms:
 - Build the workflow for divisions
 - Provide training and support to Form Owners
 - Add forms that have not yet been catalogued
- **Phase 3**
 - Full Automation State with Reengineered Business Process
 - Automated workflow
 - Integration with other key applications (PeopleSoft and ServiceNow)
- Support will be provided by the Group Admins, Form Owners and CSS and App Dev from ITS

Objectives/Success Criteria

How will you know if the project was a success? List what you are trying to accomplish and the success criteria.

- Conversion of 300 paper forms into digital forms
- Adobe Sign becomes the default way to process forms in SDCOE
- All SDCOE divisions are involved in the phased implementation and realize the benefits of the system
- Reduce paper waste
- Reduce printing costs
- Improve accuracy and compliance
- Reduce time spent tracking form status
- SDCOE and our partners will experience a smooth transition to using AdobeSign for electronic and digital signatures
- Stakeholders will report comfort with the new process
- Stakeholders will report they were well informed
- Stakeholders will report training met their needs and prepared them to use the product
- Stakeholders will report being able to sign documents on any device (cell phone, chrome book, etc.)
- Group Admins from each division will report confidence in supporting their division through the transition

Goals Alignment

With which Board Goals and ITS Goals does this project align?

- | | |
|--|---|
| <input type="checkbox"/> #B1 Connect the educational experience to the world of work | <input checked="" type="checkbox"/> #ITS1 Maximize Customer Success |
| <input type="checkbox"/> #B2 Provide educational opportunities and supports to SDCOE schools and school districts | <input checked="" type="checkbox"/> #ITS2 Create Value |
| <input checked="" type="checkbox"/> #B3 Become the leader and model for innovation | <input checked="" type="checkbox"/> #ITS3 Improve Division Efficiencies |
| <input checked="" type="checkbox"/> #B4 Maximize human and operational resources to strengthen the organizational culture of SDCOE | <input type="checkbox"/> #ITS4 Protect•Detect•Respond |

Deliverables

Which products or results do you expect upon completion of the project?

- 300 digitized forms with workflow
- Roadmap of phases and future workflow and integrations
- Configure Adobe Sync and setup groups
- Timeline
- Organization Change Management Plan
- Communication Plan
- Testing Plan (QA and UAT)
- Training Plan
- Support Plan
- Group Admins Plan from each division
- Governance Plan

Risks

List the things that you think could be risks to the success of the project. If possible, list the mitigation strategy for each risk.

- **Divisions may attempt to add forms during the implementation.** We will need a process to determine the level of effort required. Some forms may need to wait until Phase 2.
- **Resource constraints.** We need to identify training, support and communications resources ahead of time.
- **Limited user adoption.** Work with the stakeholders to identify realistic implementation levels.
- **There may be extra charges for additional functionality.** Examples: Verification, licenses, etc.

IV. Project Schedule & Milestones

Based on your needs, list either the phases and/or major milestones of the projects. Include start and end dates.

See Monday.com board for detailed project plan <https://sdcoe-its.monday.com/boards/706532584>

Phase/Major Milestone	Responsible (Lead)	Start Date or Month Begin	End Date or Month End
1. Research and Discovery Learn the current landscape, inventory existing forms, identify current routing/approval processes, conduct stakeholder meetings			
2. Configuration and Setup Set up the new environment, configure roles/permissions, determine naming conventions, plan for potential integrations			
3. Phase 1: Digitize & Train Convert all SDCOE forms to Adobe Sign templates and train users			
4. Phase 2: Build & Launch Workflows - Implement workflows and bring in any missing forms			
5. Phase 3: Automate & Integrate			
6. Project Closeout Final Lessons Learned, Survey, Final Report, Celebration, Sign Off			

V. Tools

<input checked="" type="checkbox"/> Monday.com	If Yes, which board? https://sdcoe-its.monday.com/boards/706532584 Do any new members need to be added? _____
<input checked="" type="checkbox"/> Microsoft Teams	If Yes, which team/channel will you use? TEAM EDS Project https://sdcoe2.sharepoint.com/sites/TeamEDSProject/Shared%20Documents/Forms/AllItems.aspx?viewid=f3f06016%2D6ca2%2D40ac%2Da030%2Ddf2b19469400&id=%2Fsites%2FTeamEDSProject%2FShared
<input type="checkbox"/> OneDrive	If Yes, whose OneDrive, and what is the folder named? _____
<input type="checkbox"/> SharePoint Site	If Yes, which site, and what is the folder named? _____
<input type="checkbox"/> Other	