

DISTRICT PERFORMANCE MANAGEMENT  
PROJECT MANAGEMENT PLAN

CALOOSAHATCHEE RULE DEVELOPMENT PROJECT



**Project Manager Names:**

**Technical Lead:** Brenda Mills  
**Project Manager:** Julio Fanjul

**Project SAP PS ID :** 100756  
**Project ID (Optional):** DC09



**SOUTH  
FLORIDA  
WATER  
MANAGEMENT  
DISTRICT**

**PROJECT  
MANAGEMENT  
PLAN**

**PROJECT NAME**

Caloosahatchee Rule Development Project

**Project Manager**

Technical Lead: Brenda Mills

Project Manager: Julio Fanjul

Rev. Date: **2/22/2011**

Rev# 01

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**SOUTH FLORIDA WATER MANAGEMENT DISTRICT**

**APPROVALS**

**PROJECT INFORMATION (PRINT)**

Resource Area (requesting the project in AWP)	<u>Everglades Restoration and Capital Projects</u>
Project Title (exactly as it appears in SAP PS)	<u>Caloosahatchee Rule Development Project</u>
Project SAP PS ID	<u>100756</u>
Project ID (Other)	<u>DC09</u>
Project Managers:	<u>Technical Lead: Brenda Mills</u>
	<u>Project Manager: Julio Fanjul</u>
Project Manager Supervisor:	<u>Don Medellin</u>
Project Sponsor(s):	<u>Pinar Balci</u>

**BUSINESS REVIEWS & APPROVAL**

<u>Pinar Balci</u>	<u>02/24/11</u>
Pinar Balci, Project Sponsor	Date
<u>Peter Doering</u>	<u>02/25/11</u>
Peter Doering, Project Sponsor	Date

Business Services Director Approved in PS Workflow. Signature is not required

<u>Temperince Morgan</u>	<u>2/24/11</u>
Temperince Morgan, Dir. Policy and Coordination Dept.	Date
<u>Deborah Drum for Deb Drum</u>	<u>2/25/11</u>
Deborah Drum, Dep. Dir. Restoration Sciences Dept.	Date

**Project Management Compliance Review & Support:**

<u>[Signature]</u>	<u>2/24/11</u>
Project Control Lead	Date
<u>[Signature]</u>	<u>2/24/11</u>
Project Control Support	Date

Project Manager Supervisor Approved in PS Workflow. Signature is not required

Finance Manager Approved in PS Workflow. Signature is not required





# SOUTH FLORIDA WATER MANAGEMENT DISTRICT

## APPROVALS

### EXECUTIVE SUMMARY

#### Initiation PMP Executive Approval (SAP PS Long Text Part 1.)

#### PROJECT DESCRIPTION & SCOPE SUMMARY

Describe the project.

##### Project Description

The purpose of this Project is the update of the 2000 Caloosahatchee River and Estuary Minimum Flows and Levels rule. This project includes collection and synthesis of all technical information necessary to develop a technical document and its successful peer review, to support updating the existing Caloosahatchee River and Estuary Minimum Flows and Levels criteria.

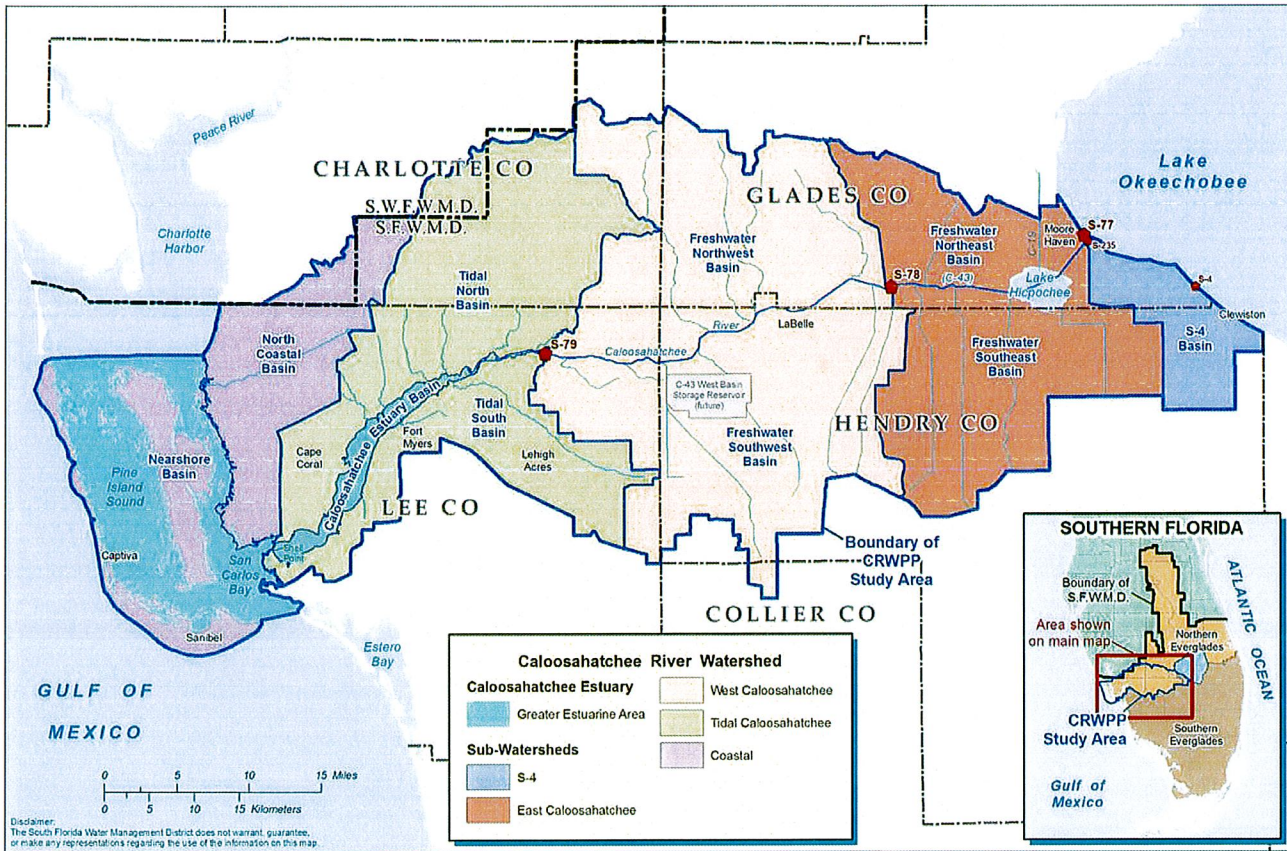


Figure 1- Caloosahatchee Estuary and surrounding watershed.





List the scope that is included in the project.

<b>Scope Included In The Project</b>
1. Data Collection
2. Data Analyses
3. Simulation model development, update and application: Watershed, hydrodynamic, salinity, flows, Vallisneria.
4. Complete a technical report and its peer review

List the scope that is specifically not included in the project to define clear boundaries.

<b>Scope Not Included In The Project</b>
1. None

**RISKS**

List any risks of interest to the Executive Office.

<b>Risks</b>
1. Lack of funding and human resource availability
2. Lack of specific technical expertise to support data collection & analyses, report writing, model development & verification
3. District priorities will change prior to completion of this work.

**EXECUTIVE SUMMARY**

**PROJECT LOCATION**

The project will reside at.

<b>Project Location</b>
1.State: Florida
2.County: This project is located in Caloosahatchee River Estuary (Figure 1)

**MANDATES/POLITICAL CONSIDERATIONS**

List any governmental mandates or political considerations.

<b>Mandates/Political Considerations</b>
1. Rule Making to identify minimum flows and levels, 373.042, FS

**BUDGET/COSTS/SETTLEMENT**

Funding – Total All Years & Fiscal Year

<b>Funding</b>	<b>FTE Costs</b>	<b>Contract Dollars</b>	<b>Total FY Costs</b>
1. Estimate total budget for current FY12:	\$192,053.42	\$131,000	\$323,053.42
2. Estimate total budget for current FY13	\$175,389.91	\$30,000	\$205,389.91
4. Estimate total budget for current FY14	\$186,923.26	\$0.00	\$186,923.26
5. Estimate total budget for current FY15	\$158,977.87	\$50,000	\$208,977.87
<b>Estimated Total Budget for All Years</b>	<b>\$713,344.46</b>	<b>\$211,000</b>	
<b>Estimated Gran Total Project Budget (FTE &amp;Funding Dollars)</b>			<b>\$924,344.46</b>



*Actual Cost Settlement:*

<b>Actual Cost Settlement</b>	<b>Resource Area</b>
1. The Costs will settle to Resource Area:	ERCP

**PROJECT SCHEDULE**

*Insert the estimated start and finish dates:*

<b>Start Date</b>	<b>Finish Date</b>
Start:10/1/2011	Finish:9/30/15

**EXECUTIVE SUMMARY**

**Planning PMP Executive Approval (SAP PS Long Text Part 2.)**

<b>Comments</b>
Detailed Plan will follow

**RESPONSIBLE FUNCTIONAL AREA**

Funding source:

<b>Funding Source</b>
DC09 – MFL Water Reservation Rules Status

**PROJECT GOALS/OBJECTIVES**

Goals / Objectives:

<b>Goals &amp; Objectives Listing</b>
1. To acquire data and perform analyses needed to update the 2000 Caloosahatchee River and Estuary MFL, based on comments and recommendations of the 2000 Peer Review Panel.

*State the performance measures to be used to track whether the objectives are being met.*

*Performance Measures:*

<b>Performance Measures Listing</b>
1. Completion of contracts for collection and analyses of technical data: Oyster predation, Benthic Macrofaunal sample identification, Statistical Analyses of Benthic Macrofaunal and Plankton datasets, Quantification of the habitat value of Vallisneria beds.
2. Completion of model development, calibration and verification: Tidal Basin flows, S-79 flows, Hydrodynamic and Salinity model updates, Vallisneria model update.
3. Completion of Return Frequency Analysis
4. Completion of Technical Criteria Document





PROJECT JUSTIFICATION

Justification:

Justification
<p>Rulemaking: Scientifically defensible technical information is the basis for all water protection rulemaking, to 1) assess the need for water protection rules, 2) identify the appropriate rule, 3) recommend criteria for rulemaking, and 4) updates to existing rules, for any given water resource. Florida Statutes and District rules require periodic review of existing rules to determine if updating the MFL criteria and rule is required. The Governing Board in November 2010 directed staff to expeditiously update the MFL criteria and rule.</p>

PROJECT DELIVERABLES

Non AWP Deliverables:

Deliverables	Quarter
<b>CRE MFL</b>	
Benthic Macrofauna data report	FY12 (Q1-Q3)
Tidal basin model development, Tidal basin model calibration & verification	FY12 (Q3)- FY13 (Q4)
Effects of MFL flows on zooplankton, ichthyoplankton, and phytoplankton- Statistical analyses	FY12 (Q1)- FY12 (Q4)
Quantifying Vallisneria habitat value (field research)	FY12 (Q1)-FY13 (Q4)
Return Frequency Analysis	FY12 (Q3)-FY13 (Q2)
Technical Criteria document including proposed MFL criteria	FY14 (Q1)-FY14 (Q3)
WRAC and Stakeholder meetings	FY14 (Q4)-FY15 (Q2)
Develop draft MFL document	FY14(Q4)-FY15(Q2)
Scientific Peer Review	FY15 (Q1)-FY15(Q2)
Final Tech. report	FY15 (Q3)-FY15(Q4)

Each of deliverable will develop with input from an interagency team and be subject to acceptance by an approved set of stakeholders.

AWP Deliverables:

AWP Deliverables	Quarter
Technical Criteria document including proposed MFL criteria	FY12 (Q3)-FY15(Q4)
Scientific Peer Review	FY15 (Q1)-FY15(Q2)
Final Technical Report	FY15 (Q3)-FY15(Q4)



**SOUTH FLORIDA WATER MANAGEMENT DISTRICT**

**EXECUTIVE SUMMARY**

**ASSUMPTIONS**

<b>Assumptions</b>
1. The District priorities remain consistent with this project from FY11 through FY15
2. Staff and funding to provide the necessary technical expertise/oversight are available for allocation to this project

**CONSTRAINTS**

<b>Constraints</b>
1. Specific expertise is required for proposed research and model development and verification
2. Availability of funding to support the collection and analyses of data.

**RELATED PROJECTS**

<b>Related Projects</b>
N/A

**TEAM**

**PROJECT MANAGEMENT OVERSIGHT TEAM LISTING & RESPONSIBILITY**

<b>Name</b>	<b>Role</b>	<b>Responsibility</b>
Pinar Balci	Federal and State Policy Division Director	Project Oversight
Temperince Morgan	Director, Policy and Coordination Department	Project Oversight
Peter Doering	Director, Coastal Ecosystem Sciences Division	Provide direction, resources, priorities, and management oversight
Deb Drum	Deputy Dept. Director, Restoration Sciences Dept.	Provide direction, resources, priorities, and management oversight





## PROJECT TEAM LISTING

The project team is the list of team members, by name, directly supporting the project which is responsible for developing the strategies to deliver the project. The identified resources will be responsible for development, maintenance, and support of all project management plan elements throughout all project phases.

Project team members include: Project Manager, Project Manager Supervisor, and supporting functions. Supporting functions are all functions required for the project including but not limited to Budget, Finance, Assets, Permitting, Land, IT, Modeling, and Procurement. The supporting functions identified in the Person Responsible, & Applicant fields in Project System.

The assigned (by BSD) Resource Area Project Control Specialist and or Subject Matter Expert will provide the project team with support in the use of this document for constructing, maintaining, and reporting their portion of the projects overall plan and performance through all project phases. It is the project team's responsibility to proactively request support resources in a timely manner with appropriate advance notice of business requirements and report cycles to insure accurate, up to date project information.

### Functional Managers (SAP PS Person Responsible):

*Once the project kick off meeting has occurred during the initiation of the project the functional managers are to estimate the required skill type & total FTE that is required by their function to support the project for the full projects duration.*

*The functional managers identified on the prior Team Listing will actively own their portion of the Project Management Plan for the function. They perform a managerial role and are to be actively managing their assigned WBS elements by working directly with the overall project manager and the functional lead employee (Applicant) which they have assigned to the project. The functional managers insure the requirements of the project and their function are met by proactively meeting with the overall project manager and Applicant to Initiate, Plan, Execute, Close, and Monitor & Control the project to the standards within this manual.*

### Functional Project Lead (SAP PS Applicant):

*The functional managers assign a lead employee of the function to support the project:*

*The lead employee assigned to the project for the function is assigned to the SAP PS Applicant field for their respective WBS elements identifying responsibility. The lead functional employee is to manage the WBS in the manner the overall project manager manages the project. The lead functional employee works closely with the project manager to insure their portion of the project work meets all requirements of the project as defined in this manual for all phases. The lead employee may also perform the role of the Functional Manager Employee described below for smaller work efforts where more than one functional person is not required to support the project.*

### Functional Employee (SAP PS Activity Resource or Activity Element Resource):

*Additional employees that will directly be performing the day to day work will be assigned as resources to Activities or Activity Elements. These employees are coordinated by the Applicant for their assigned WBS. There must always be an assigned Applicant for each WBS.*

USACE Project:  Y or  N (check one)





**Project Team Listing by Resource Area**

The project manager is to complete the team table below based on the estimates provided by the functional managers after the project Initiation Kickoff Meeting.

<b>Project Team Listing - Requirements by Resource Area</b>					
List Functions	Assigned Staff	Skill of Functional Employee	Identify Employee	FY12 FTEs	Total FTEs
<b>ERCp</b>					
<b>Policy &amp; Coord Dept.</b>	Temperince Morgan	Project Oversight	Sponsor		
Technical Project Lead	Brenda Mills	Technical Project Lead	Project Lead	0.2	0.8
Project Manager	Julio Fanjul	Project Management	Applicant	0.2	0.8
<b>Restoration Sciences Department</b>					
Technical Lead	Peter Doering	Technical Oversight - Ecological	Resource	0.15	0.6
Technical Lead	Yongshan Wan	Technical Oversight - Modeling	Resource	0.2	0.8
Model Development	Chenxia Qiu	Lead Scientist, Model Development	Resource	0.2	0.8
Model development	Chris Buzzelli	Senior Scientist, Model development	Resource	0.2	0.8
GIS and Data Management	Cecilia Conrad	Geographer Senior GIS & Data Mgmt.	Resource	0.2	0.8
Model Development	Fawen Zheng	Lead Engineer, Model development	Resource	0.125	0.5
Providing Resources	Teresa Coley	Science Supervisor, Coastal	Resource	0.05	0.2
Report writing	Dan Crean	Scientist III ,Data Collection	Resource	0.1	0.4
Data management	Beth Orlando	Scientist III, data collection	Resource	0.1	0.4
Data management	Kathleen Haurert	Scientist II, data collection & analyses	Resource	0.15	0.6
Plan Evaluation and development	vacant	Lead Scientist	Resource	0.125	0.5
Report writing	vacant	Principle Scientist	Resource	0.125	0.5
<b>Total Resource Requirements</b>				<b>2.125</b>	<b>8.5</b>

*Each Applicant identified above is responsible to support all phases of the project and insure all elements of the PMP are accurate for their portion (assigned WBS elements) of the project.*



**SOUTH FLORIDA WATER MANAGEMENT DISTRICT**

<b>Project Contract List – Request for Contract Services</b>				
<b>List Functions</b>	<b>Skill of Contractor</b>	<b>Identify Contractor</b>	<b>Fiscal Year</b>	<b>Total Funding</b>
Oyster predation Study	Experimental Design, Prior Research in Oyster Field Studies	TBA	FY12	\$60,000
Benthic Macrofaunal sample identification	Taxonomist with expertise in Classification of Benthic Macrofauna	TBA	FY12	\$5,000
Statistical Analysis of Larvae	Power Analysis Statistics	TBA	FY12	\$26,000
Quantification of the habitat value of Vallisneria beds	Expertise in Analysis of Stable Isotopes	TBA	FY12	\$40,000
<b>FY12 Totals</b>				<b>\$131,000</b>
Benthic Macrofaunal sample identification	Taxonomist with expertise in Classification of Benthic Macrofauna	TBA	FY13	\$30,000
<b>FY12 Totals</b>				<b>\$30,000</b>
Technical Peer Review	Technical Expertise in Subject Matter	TBA	FY15	\$50,000
<b>FY12 Totals</b>				<b>\$50,000</b>
<b>Grand Total Dollar Requirements</b>				<b>\$211,000</b>



