

# BOE IT Modernization Project

## Schedule Management Plan (SMP)

March 17, 2026

# Contents

---

Introduction..... 3

Function and Purpose ..... 3

# Introduction

---

The BOEM project’s “Schedule Management Plan” (SMP) document serves a critical role in the overall management of our project. All projects have a schedule, and all projects will incur some level of change. This plan is to organize and address the schedule and task changes that impact the project schedule. The Schedule Management Plan provides the project manager with the needed information and tasks to take corrective steps to get the project back on schedule.

## Function and Purpose

---

The Schedule Management Plan describes how the schedule will be managed throughout the project. The plan will address issues such as:

- Who is responsible for maintaining the schedule
- How often the schedule will be updated
- What methods will be used to track progress
- How changes to the schedule will be controlled

With an approved Schedule Management Plan, the project management team can make informed decisions and guide the project to a successful outcome.

It also includes a project timeline detailing the duration of individual tasks and critical milestones. The Project Manager will use schedule management to monitor progress against the baseline schedule, control schedule changes, and report on progress against planned milestones. The Schedule Management Plan provides guidelines for scheduling-related matters.

This Schedule Management Plan was created to meet project managers' needs by addressing schedule threats and ensuring the desired outcomes, including the project's completion date.

Schedule Management Plan addresses:

No.	Schedule Management Plan Item	Response
1	Schedule Owner	Contractor Project Manager
2	Scheduling Methodology	Gant Waterfall
3	Scheduling Software	Enterprise Cloud version of Microsoft Project
4	Who is part of the scheduling management and scheduling process	<ul style="list-style-type: none"> <li>• Contractor Project Manager</li> <li>• Technical Lead</li> <li>• Team Leads</li> <li>• Subject Matter Experts</li> <li>• Software Programmers</li> <li>• Hardware and Cloud Implementers</li> <li>• Task Owners</li> </ul>
5	Performance monitoring processes	<ul style="list-style-type: none"> <li>• Team's Daily Stand Up Meeting Updates</li> <li>• Team's weekly and monthly status reports</li> <li>• Weekly Status Reports</li> </ul>
6	Mitigation plans to address schedule variances	<ul style="list-style-type: none"> <li>• Resource Adjustments and Allocation</li> <li>• Resource Additions Including more Senior and Experienced Staff to Fix the Issue</li> <li>• Adjusting completion time to the task and affected tasks</li> </ul>
7	Confirm schedule change control procedures	<ul style="list-style-type: none"> <li>• BOE project sponsors, project manager, business managers, SME's, CDTFA technical manager(s)</li> <li>• BOE change control board (CCB)</li> </ul>

8	Schedule report frequency, format, and recipient	<ul style="list-style-type: none"> <li>• Frequency: Weekly, Due on Friday by 4:30 PM. If Friday is a holiday, the report is due the day before, Thursday by 4:30 PM</li> <li>• Frequency: At the end of each month</li> <li>• Format: <ul style="list-style-type: none"> <li>○ Email with MS Word document attachment</li> <li>○ MS Word document contents: <ul style="list-style-type: none"> <li>• All Key Task Updates on or off track by percent to baseline</li> <li>• Critical Path Identified and monitored end time</li> <li>• Status Position Relative to Implementation Roadmap</li> <li>• Resource/Staff Utilization Percentage as a whole and by Person</li> <li>• Any Unanticipated Tasks</li> </ul> </li> </ul> </li> <li>• Recipients <ul style="list-style-type: none"> <li>○ Contractor: <ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Technical Lead</li> <li>• Team Leads</li> <li>• Contractor's Project Owner/Director</li> </ul> </li> <li>○ BOE Customer: <ul style="list-style-type: none"> <li>• Project Sponsor(s)</li> <li>• CDTFA Technical Manager(s)</li> <li>• CDTFA CIO</li> <li>• BOE project manager</li> <li>• Business manager(s)</li> <li>• Data Owner</li> <li>• BOE and CDTFA SME</li> <li>• California Department of Technology (CDT): Office of State Technology Procurement (OSTP)</li> </ul> </li> </ul> </li> </ul>
---	--	---

		<p>and Project Approval Lifecycle (PAL)</p> <ul style="list-style-type: none"> <li>• IV&amp;V Consultant</li> </ul>
9	Schedule Risk Management	<ul style="list-style-type: none"> <li>• Unanticipated Tasks</li> <li>• Resource Availability</li> <li>• Software Product or Utility Availability</li> <li>• Log risks in the risk log spreadsheet with mitigation plan</li> <li>• Identify risk with BOE project manager, Project sponsors, business managers, and CDTFA technical manager(s)</li> </ul>
10	Identify Project Milestones and Deadlines	<ul style="list-style-type: none"> <li>• Identify in the Microsoft Project schedule in Red Bold Font</li> <li>• Provide updates via MS PowerPoint presentation slide in the form of a List/table or an illustration graphic to a timeline</li> </ul>