Interagency Interoperability Oversight Group

Interagency Helpdesk Escalation Procedure Project Charter
September 14, 2010

Project Overview

The IIOG has seen several examples where helpdesk tickets are left unresolved indefinitely. These examples occur when the source of the problem crosses agency boundaries between Bureau of Land Management and Forest Service. IIOG direction is that there needs to be clear understanding and policy in both the FS and BLM that tickets are not closed until the problem is resolved; even if the knowledge documentation does not include instructions on resolution.

Project Scope/Objectives

- Create a Memorandum of Understanding to support a cooperative environment between Forest Service and Bureau of Land Management helpdesks, including reporting methods.
- Develop methodology to ensure proper resolution of tickets which require assistance from both helpdesks
- Future additional agency participation will be considered in solution development
- Establish clear ownership of the tickets. The owner works with the other agency for resolution.
- Develop reporting methodology
- Define the services and who is responsible for them this includes all of the people identified to escalate and/or coordinate higher severity issues
- Leverage COTS, GOTS or open source tool sets to help with this process
- Review other similar efforts
- One call solution-person answering the call takes responsibility for resolution (warm transfer)

Roles and Responsibilities

- **Project Sponsor(s):** Vaughn Stokes (CIO for USDA FS) and Ronnie Levine (CIO for BLM).
- **Project Champion(s):** Joe Powers (FS) and Pat Stingley (BLM)
- **Project Manager:** Eileen Richey
- **Customer:** Multiple agency employees
- **Project Team Co-Lead**: Darryl Bright (BLM) and Dana Watts (FS)

Name	Agency	Location
Dana Watts	FS	Missoula, MT
Darrell Bright	BLM	Springfield, VA
Alan Flesh	FS	Golden, CO
Anthony Colon	BLM	Boise, IO
Les Rice	BLM	Denver, CO
Scott Holmes	USGS	Denver, CO
Kolleen Shelley	FS	Boise, ID
Pat Stingley	BLM	Washington, DC
Laura Hill	FS	Boise, ID
Laurie Jakubowski	FS	Boise, ID
Matt Cnudde	FS	Boise, ID
Stephen Zelczak	BLM	Denver, CO
Eileen Richey	FS	Portland, OR

Project Deliverables

- **Project Charter - (major) -** Definition of project objectives, scope and major timelines. It will be signed, and kept up to date as a working document for the project team and stakeholders.
- **Security Review**
- **Final MOU -** Agency / Bureau level signatures
- **Helpdesk Agent training**
- **Support Documentation** – This document describes who will be responsible for support and how the support will be handled for both agencies.
    - Ticket escalation procedures and knowledge document enhancements
    - Cross Agency procedures
    - Technology solution for follow-on process
- Explore and document similar efforts to ensure this project does not conflict
- Identify positions/individuals responsible for coordination and escalation

Project Assumptions

- Expected response time for critical situations will follow expected timelines for top priority tickets.
- Expected resolution time for critical situations will follow expected timelines for top priority tickets.
- Helpdesk hours of operation will be 24 x 7 for Forest Service and 6 A.M. to 6 P.M. MST Monday through Friday for BLM. BLM helpdesk is closed when the Denver Federal Center is closed.

Major Milestones with Completion Dates

Major Milestone	Completion Date
Signed Project Charter	TBD
MOU completion	30 days after charter is signed
Agency/Bureau signatures on MOU	45 days after MOU completion
Helpdesk plan	90 days after charter is signed
Security review	60 days after Helpdesk plan is finished
Support documentation and metrics for success	60 days after finalized Helpdesk plan
Helpdesk Agent training	30 days after finalized documentation
Implement monitoring plan	30 days after training
Project Closure	5 days after completion of monitoring

References

Meeting summary Notes from April 2010 IIOG meeting

Risk Management

Risk	Mitigation	Contingency Plan
Politics and governance (mitigate agency differences and procedures)	Having the correct authority involved to work out issues	Clearly identify the risks and issues to be escalated.
Resource shortages	Identify the shortage and determine the priority of the issue and have the authority to juggle workload	Identify options to achieve the end result with different resources
Lack of money resources	Having the correct authority involved to work out issues	Adjust the scope and timeframes.

Risk	Mitigation	Contingency Plan
Differences in security policy	Having the correct authority involved to work out issues	Clearly identify the risks and issues to be escalated
Lack of entitlement for services	Need to know each organization's procedures/define escalation procedures	This program should be on a national level rather than regional
Helpdesks have different operating hours	Have procedures in place to transfer helpdesk tickets with a follow through plan to ensure the ticket is processed	Examine alternative options for critical ticket escalation.

Performance Measures

- Approved Charter
- Bi-Weekly Status Reports
- Timely Deliverables
- Completed Milestones

Approval

This charter for the Interagency Helpdesk Escalation Procedure project is approved by the Interagency Interoperability Oversight Group (IIOG) as written.

Jim Douglas
Chair, Interagency Interoperability Oversight Group

Sept. 14, 2010
Date