



CD FY09 Tactical Plan Review

FY09 Tactical Plans for
[Talk name]

[Presenter's Name]

[Date]

FY09 Tactical Plan for [Level 0 Activity name]

- Relevant Strategic Plan(s):
 - [Insert title of main referenced strategic plan here]
 - [Insert titles of other relevant strategic plans here, if any]
- Tactical Plan Leader: [Insert Name]
- Organizational Unit home: [Quad-Department]

FY09 Tactical Plan: Strategies and Goals



- **Tactical Plan Strategies**

- [Insert/summarize tactical plan strategies, prioritized and/or time-ordered]

- **Tactical Plan Goals**

- [Insert/summarize tactical plan goals, prioritized and/or time-ordered]

FY09 Tactical Plan: Objectives



- **Tactical Plan Objectives**
 - [Insert/summarize tactical plan objectives, prioritized and/or time-ordered]

FY09 Tactical Plan: Past Action Items



- Resolution of Past Action Items
 - [Items called out in past Tactical Plan review or status meetings.]
 - FY08 Review Action Item List is in DocDB #2662
 - FY08 Status Reports Action Item List is in DocDB #2664

Service Activity: [insert name]

(1 slide per service activity in the Tactical Plan)

- [Brief oral description to provide context.]

- Goals Related to this Activity [from Tactical Plan]
 - 1. Goal 1
 - [Identify if new or existing goal, and relative priority. Indicate status or priority in separate color/fonts.]
 - 2. Goal 2
 - [Identify if new or existing goal, and relative priority. Indicate status or priority in separate color/fonts.]
 - 3. Goal 3
 - [Identify if new or existing goal, and relative priority. Indicate status or priority in separate color/fonts.]

- Key Metrics
 - 1. [List metrics here...]
 - What is it? (tickets clear per month, service uptime, service request response time,...)
 - Goal level – planned vs actual. Impact high or low, felt by whom, if level not met
 - 2. URL of online presentation of metrics
 - 3. Milestones, if any applicable (may be none for some Service Activities)

- Issues and Risks (specific to this activity, includes allocation impact)
 - 1. List Issues and Risks...

Project Activity: [insert name]

(1 slide per project activity in the Tactical Plan)

- [Brief oral description to provide context.]
- Goals Related to this Activity [from Tactical Plan]
 - 1. Goal 1
 - [Identify if new or existing goal, and relative priority. Indicate status or priority in separate color/fonts.]
 - 2. Goal 2
 - [Identify if new or existing goal, and relative priority. Indicate status or priority in separate color/fonts.]
 - 3. Goal 3
 - [Identify if new or existing goal, and relative priority. Indicate status or priority in separate color/fonts.]
- Key Milestones
 - 1. [List key milestones and associated deliverables here...]
What is it? When – planned vs actual. Impact high or low, felt by whom, if date not met.
 - 2. [URL that shows project progress towards milestones]
 - 3. Metrics, if any applicable (may be none for some Project Activities)
- Issues and Risks (specific to this activity, includes allocation impact)
 - 1. List Issues and Risks...

FY09 Resource Request, Preliminary Allocation

Level 0 Activity: [Level 0 Activity name]

Example table from budget spreadsheet....

FY09 Tactical Plan	Activity Level 1	FTE Request At Activity Level 1	M&S Request At Activity Level 1	FTE Allocation At Activity Level 1	M&S Allocation At Activity Level 1
CDMS Computing	CDMS Computing	0.15	0	0.15	0
	COSMO-COMPUTING	0.00	0	0.00	0
	COUPP	0.20	0	0.20	0
Experimental Astrophysics	DES	4.57	154,507	4.57	150,607
	JDEM	4.00	56,600	4.00	38,808
	Pierre Auger	0.25	3,500	0.25	2,030
Total		9.17	\$214,607	9.17	\$191,445

Impact of Preliminary Allocation



- [Use this slide to address impact of tentative allocation on ability to meet CD mission, strategic goals, or tactical plan goals and objectives.]

Template Guidance: *(not part of the presentation)*

- Activity = Activity Level 1 or lower explicitly listed in Tactical Plan
- Activities have been classified in Tactical Plans as either being more Project-like or Service-like
 - Projects: finite defined lifetime, defined deliverable. Includes R&D work.
 - A.k.a Upgrades, ...
 - Services: same operation or task repeatedly.
 - A.k.a. Operations, Maintenance, Support, ...
 - Whether an activity is a project or service determines which format slide to use later.
- Terminology
 - Obligation Budget: Allocated budget. This may differ from the budget request.
 - YTD Obligations: Fully incurred expenses. Does not include RIPs, Req.s in CD, etc.
 - Current FY08 Forecast: Estimate of all obligations to be incurred by the end of FY08.
 - M&S: Equipment + Operating. Operating includes Travel, Material Purchases, Professional Services (contractors), Maintenance (licenses), and Other.
 - RIP: Requisitions in Progress