Treasury's Community Development Financial Institutions (CDFI) Fund Agreements Management Using Process Libraries and Electronic Handbooks

(Where Shakespeare Meets Freud)

Demonstration

BY D'ANGELO FOR THE WASHINGTON POST
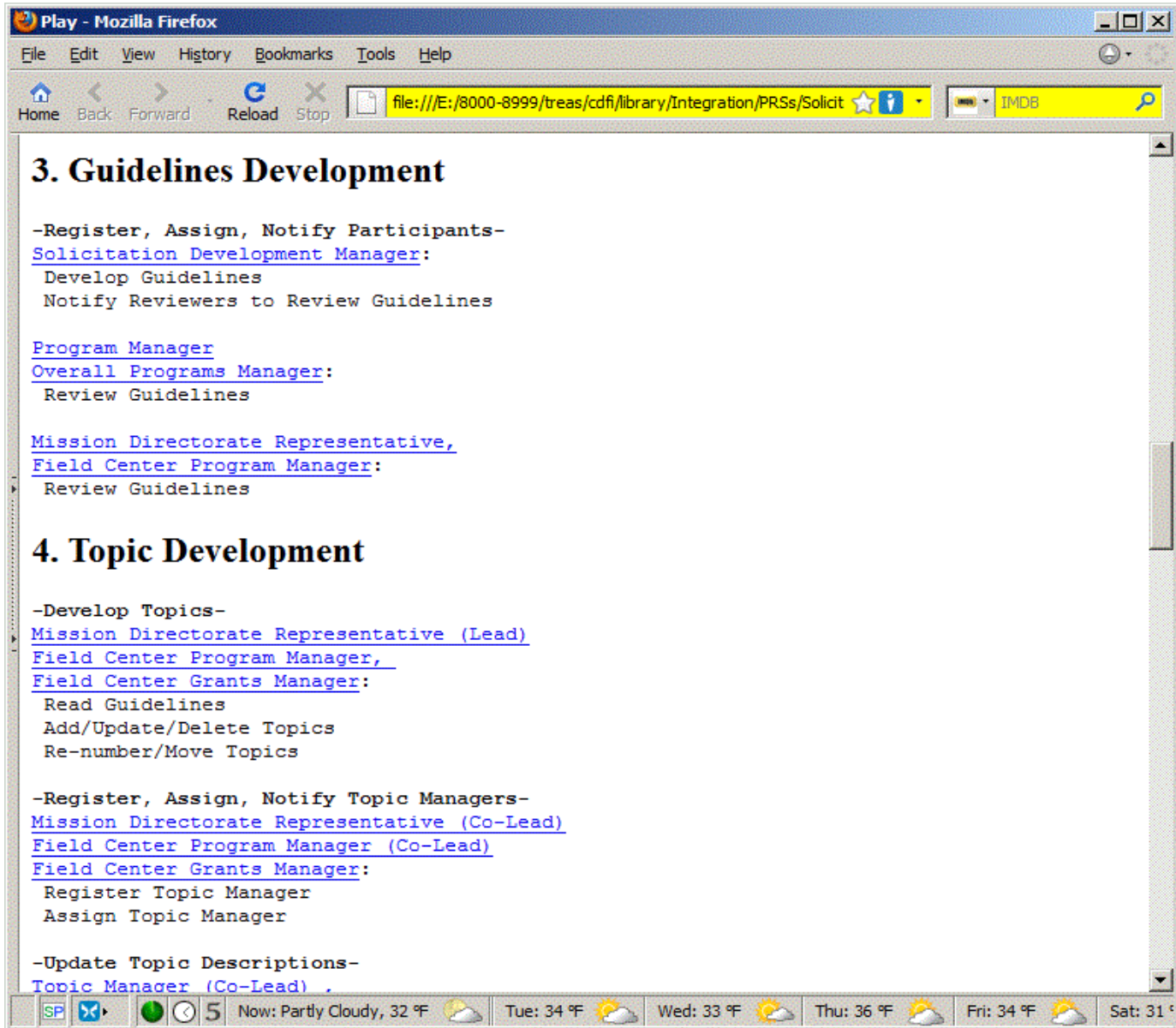
Dr. Barry E. Jacobs

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The Bottom Line:

We believe that to truly understand one's universe, one must see it thru multiple "eyes" and also have tools to "communicate" these views.

To do this, we propose editable and cost-saving process documentation "plays"
for process developers and participants
to help them quickly and effectively learn, integrate, test, teach, and work together.
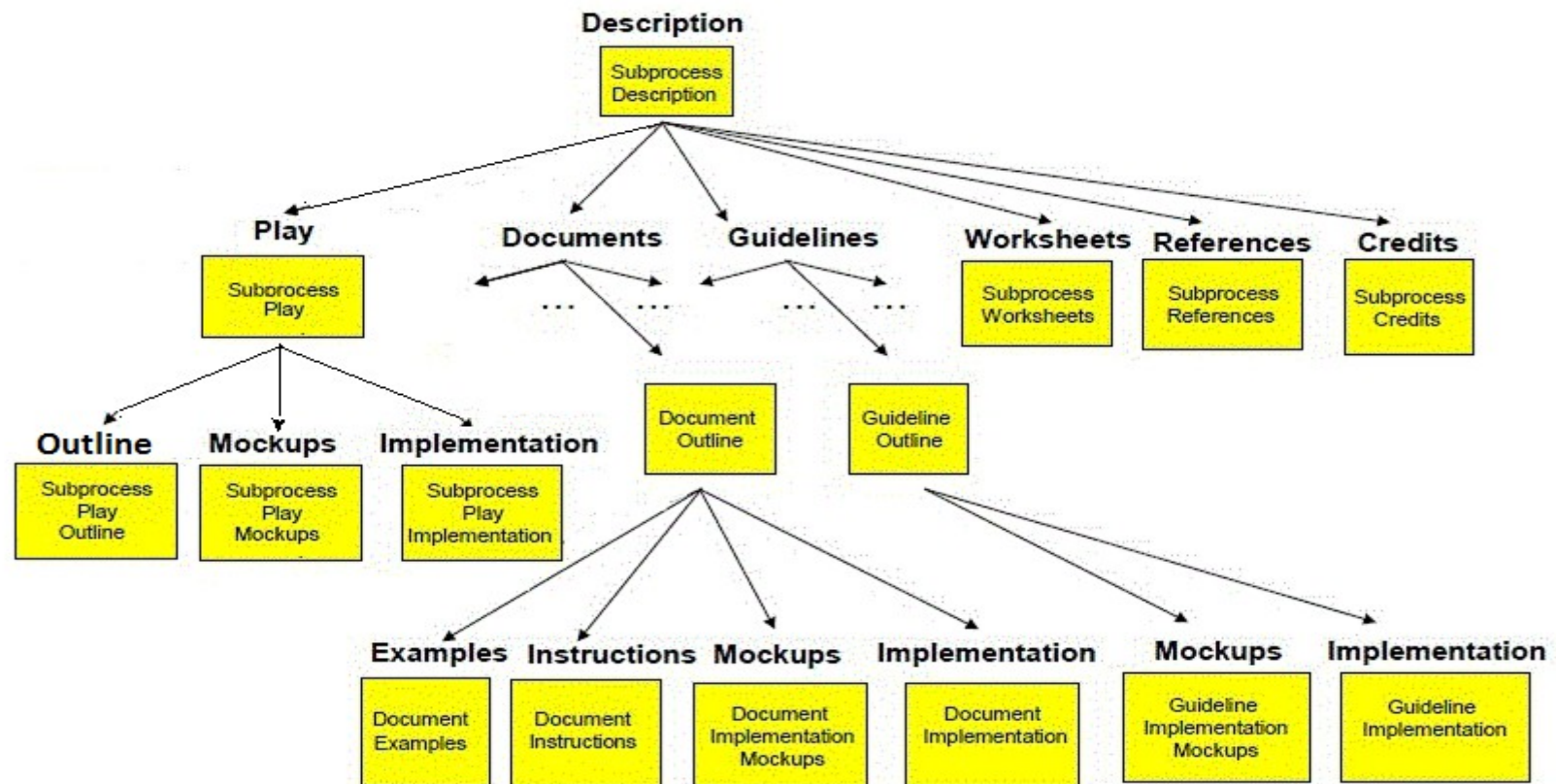
These "plays" may be added to new or existing systems.

Plays describe subprocess execution.

Browser window (Play - Mozilla Firefox) showing:

3. Guidelines Development

-Register, Assign, Notify Participants-
Solicitation Development Manager:
 Develop Guidelines
 Notify Reviewers to Review Guidelines

Program Manager
Overall Programs Manager:
 Review Guidelines

Mission Directorate Representative,
Field Center Program Manager:
 Review Guidelines

4. Topic Development

-Develop Topics-
Mission Directorate Representative (Lead)
Field Center Program Manager,
Field Center Grants Manager:
 Read Guidelines
 Add/Update/Delete Topics
 Re-number/Move Topics

-Register, Assign, Notify Topic Managers-
Mission Directorate Representative (Co-Lead)
Field Center Program Manager (Co-Lead)
Field Center Grants Manager:
 Register Topic Manager
 Assign Topic Manager

-Update Topic Descriptions-
Topic Manager (Co-Lead) .

Address bar: file:///E:/8000-8999/treas/cdfi/library/Integration/PRSs/Solicit   IMDB
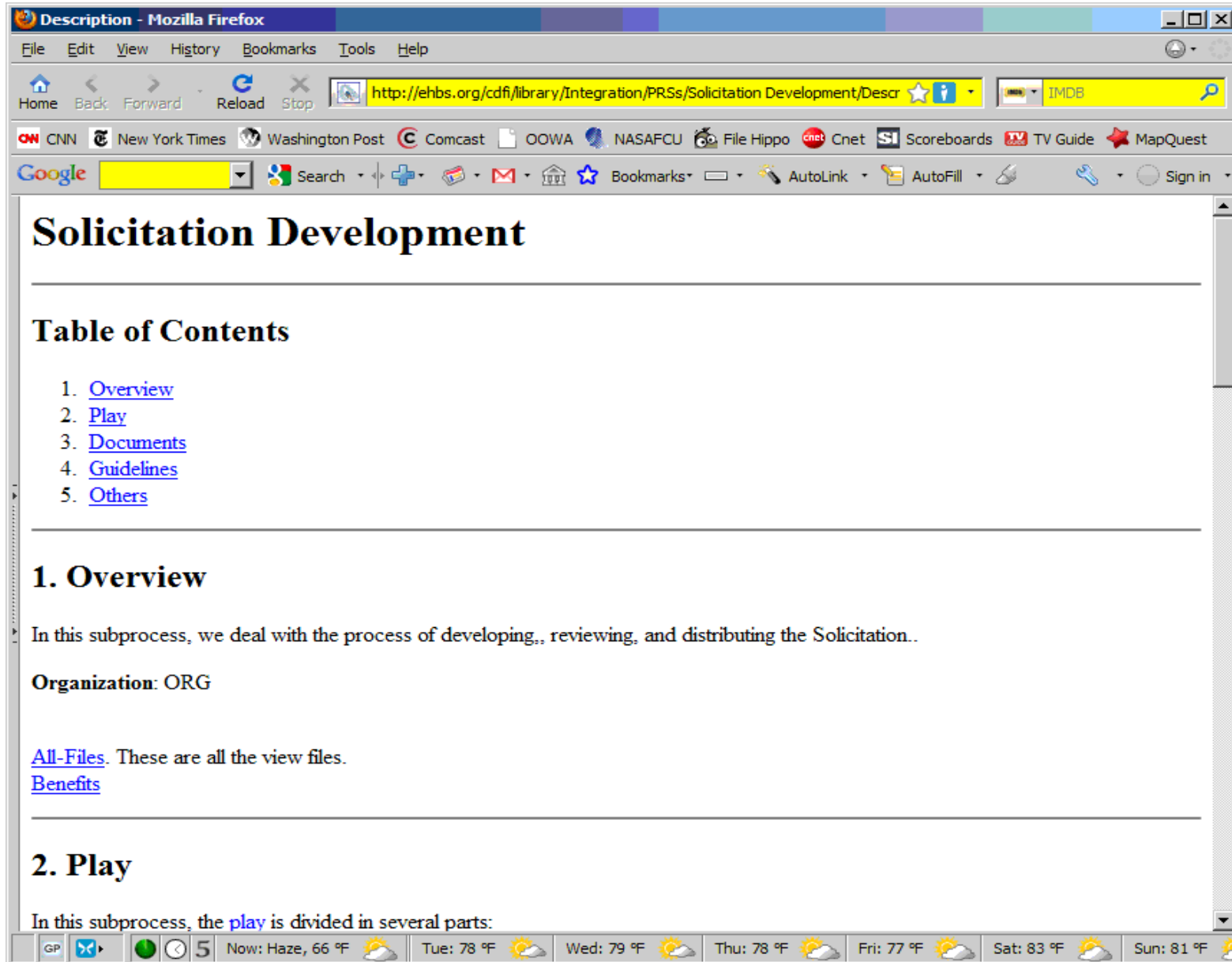
Benefits:

- Facilitates the collection of system and organizational requirements,

- Does not anger/upset people whose opinions are heard,

and

- Increases the interaction between managers, process developers, and participants.

Our basic approach is to wrap organization's subprocesses in a common envelope containing "communication vehicles" that facilitate intra- and inter-organization communication.

Description

Subprocess Description

Play

Subprocess Play

Documents   **Guidelines**   **Worksheets**   **References**   **Credits**

...   .

Subprocess Worksheets   Subprocess References   Subprocess Credits

Outline   **Mockups**   **Implementation**

Subprocess Play Outline   Subprocess Play Mockups   Subprocess Play Implementation

Document Outline   Guideline Outline

Examples **Instructions** **Mockups**   **Implementation**   **Mockups**   **Implementation**

Document Examples   Document Instructions   Document Implementation Mockups   Document Implementation   Guideline Implementation Mockups   Guideline Implementation

Descriptions summarize subprocesses.

Plays describe subprocess execution.

3. Guidelines Development

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Mission Directorate Representative (Co-Lead)
Field Center Program Manager (Co-Lead)
Field Center Grants Manager:
 Register Topic Manager
 Assign Topic Manager

-Update Topic Descriptions-
Topic Manager (Co-Lead) .

Documents describe subprocess data.

Description - Mozilla Firefox

File   Edit   View   History   Bookmarks   Tools   Help

http://ehbs.org/cdfi/library/Integration/PRSs/Solicitation Development/Descr

3. Documents

In this subprocess, we have the following document types:

Registrations. These are used to represent user Registrations.
Guidelines. These are used to represent Solicitation Development Guidelines.
Topics. These are used to represent Solicitation Topics.
Front-End. These are used to represent Solicitation Front-Ends.
Pre-Solicitation. These are used to represent Pre-Solicitations.
Pre-Solicitation Reviews and Approvals. These are used to represent Pre-Solicitation Reviews and Approvals.
Pre-Solicitation Public Comments. These are used to represent Pre-Solicitation Public Comments.
Solicitation. These are used to represent Solicitations.
Solicitation Reviews and Approvals. These are used to represent Solicitation Reviews and Approvals.
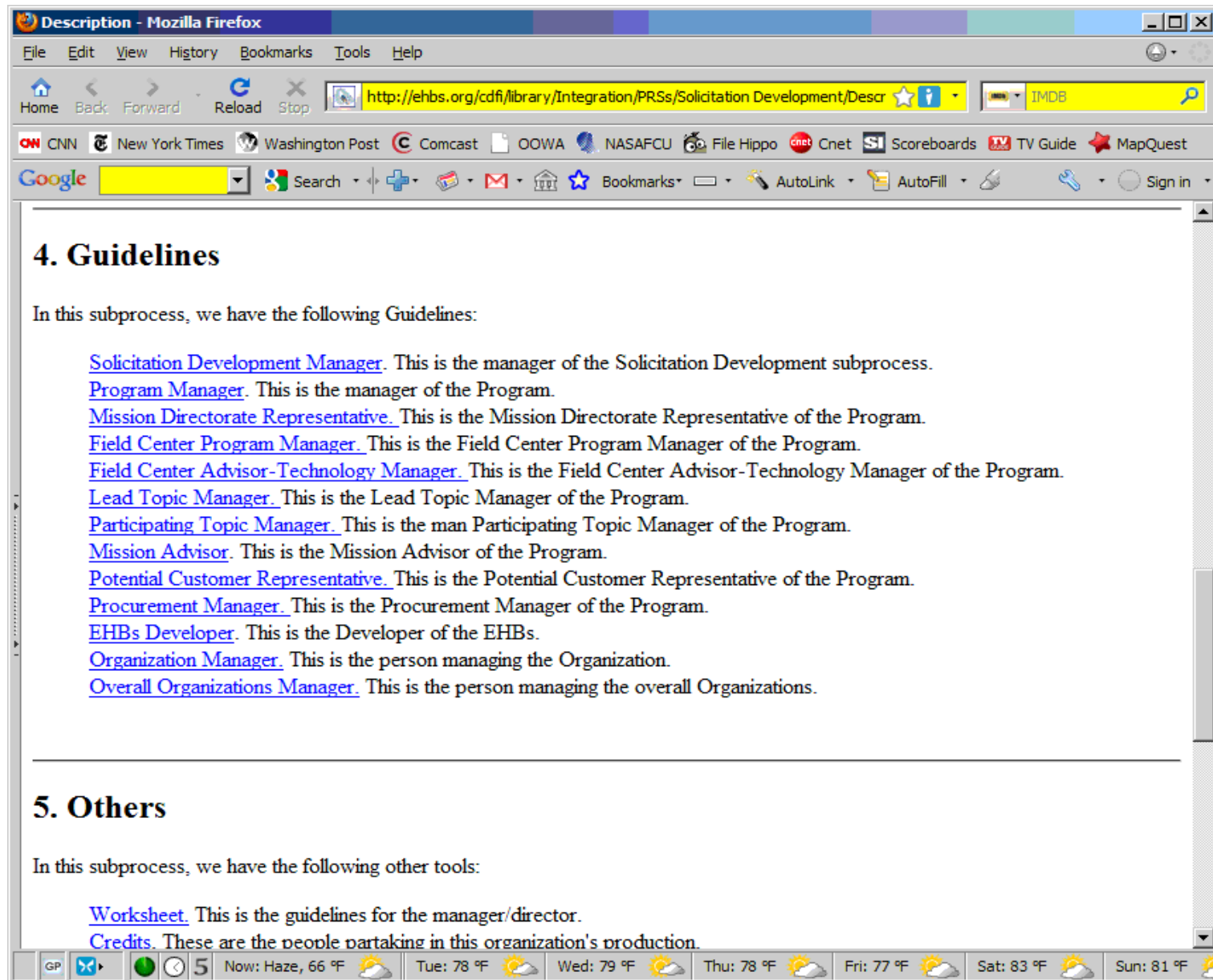Outreach Records. These are used to represent Outreach Records.

4. Guidelines

In this subprocess, we have the following Guidelines:

Solicitation Development Manager. This is the manager of the Solicitation Development subprocess.
Program Manager. This is the manager of the Program.
Mission Directorate Representative. This is the Mission Directorate Representative of the Program.
Field Center Program Manager. This is the Field Center Program Manager of the Program.
Field Center Advisor-Technology Manager. This is the Field Center Advisor-Technology Manager of the Program.
Lead Topic Manager. This is the Lead Topic Manager of the Program.

Now: Haze, 66 °F   Tue: 78 °F   Wed: 79 °F   Thu: 78 °F   Fri: 77 °F   Sat: 83 °F   Sun: 81 °F

Guidelines describe user subprocesses.

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Lead Topic Manager. This is the Lead Topic Manager of the Program.
Participating Topic Manager. This is the man Participating Topic Manager of the Program.
Mission Advisor. This is the Mission Advisor of the Program.
Potential Customer Representative. This is the Potential Customer Representative of the Program.
Procurement Manager. This is the Procurement Manager of the Program.
EHBs Developer. This is the Developer of the EHBs.
Organization Manager. This is the person managing the Organization.
Overall Organizations Manager. This is the person managing the overall Organizations.

5. Others

In this subprocess, we have the following other tools:

Worksheet. This is the guidelines for the manager/director.
Credits. These are the people partaking in this organization's production.

Subprocess Worksheets facilitate subprocess manager communication with process developers and participants.

References list other related resources.

Credits acknowledge people's contributions.

Tools that can be focused on during stages- by tool.

File Edit View History Bookmarks Tools Help

ehbs.org/intro/summary/stages1.html

Google

Tools To Focus On During Stages- By Tool.

Tool	Process Developer	Process Participant
Descriptions	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Plays	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Documents	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Role Guidelines/EHBs	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Subprocess Worksheets	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
References	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Credits	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together

Tools that can be focused on during stages-by stage.

File   Edit   View   History   Bookmarks   Tools   Help

ehbs.org/intro/summary/stages2.html   Google

Tools To Focus On During Stages- By Stage.

Stage	Process Developer	Process Participant
Learn	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.
Integrate	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Documents Using Role Guidelines/EHBs.
Test	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.
Teach	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.
Work Together	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.

Overview of Treasury Community Development Financial Institutions Agreements Process Library

The objective of this tool is to help Treasury Community Development Financial Institutions Agreements Managers (and Staff) to *quickly learn* to build and manage Agreements. We present our approach in five bullets.

- We focus on the documents that Treasury Community Development Financial Institutions Agreements Managers prepare. These documents appear within various subprocesses (e.g., **1**) and within multiple organizations (e.g., **2**).

- For each subprocess, we create a directory of documents for that subprocess. (e.g., **1**, **2**)

- For each document type, we create files to help prepare the document. These files include document overview, organization, related links, structure, references, organization samples, organization contacts, and *sample documents from other organizations*. (e.g., **1**, **2**)

- Sample documents have three levels of access: a) Unconditionally Distributable (e.g., **1**, **2**), b) Maintained In Organization Libraries (e.g., **1**, **2**), and c) Proprietary (e.g., **1**, **2**).

- Each organization gets worksheets for its own use. These worksheets also help add to the database as Managers go thru the subprocesses. (e.g., **1**, **2**)

For more information on the Treasury Community Development Financial Institutions Agreements Process Library see: **paper**, **summary**, and **other process libraries**.

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For more information on the Treasury Community Development Financial Institutions Agreements Process Library see: paper, summary, and other process libraries.

Grants

Product Realization Subprocesses								
Integrated Problems-Solutions Database	Planning Grants	Solicitation Development	Submission	Review & Selection	Negotiation & Award	Administration	Closeout	Post-Closeout

(Potential Customers: Community Development Organizations)

Product Distribution Subprocesses							
Integrated Problems-Solutions Database	Planning Distributions	Distribution Facility Solicitation Development	Problem Submission	Problem Handling	Agreement Administration	Agreement Closeout	Post-Agreement Closeout

(Potential Customers: Community Development Organizations)

Support Subprocesses								
Survey Management	Computer Systems Development and Evolution	Computer Systems Operations and Network Administration	Home Page Management	Education and Outreach Activities	Facilities Management	Security	Small Systems (Mac and PC) Support	Visualizations

Improvement Subprocesses		
ISO 9001: 2000	CMMI- Staged	CMMI-Continuous

Common Subprocesses					
Organization Subprocess Formulation	Organization Subprocess Implementation	Organization Subprocess Customer Support	Organization Subprocess Evaluation	Organization Subprocess Update	Organization Subprocess Closeout

Organizations provide different views of the subprocesses, some of which may be proprietary.

Treasury's Community Development Financial Institutions (CDFI) Fund Agreements Organizations - Mozilla Firefox

File   Edit   View   History   Bookmarks   Tools   Help

Home   Back   Forward   Reload   Print   Stop   file:///E:/8000-8999/treas/cdfi/plib/Organizations.htm   IMDB

Treasury's Community Development Financial Institutions (CDFI) Fund Agreements Organizations

Product Realization Subprocesses Organizations
- Block Grants Office- State and local government applicants
- Formula Grants Office- State and local government applicants
- Discretionary Grants Office- State and local government applicants
- Training Grants Office- State and local government applicants
- Discretionary Grants Office- Non-government applicants
- Training Grants Office- Non-government applicants

Product Distribution Subprocesses Organizations
- Block Grants Office- State and local government applicants
- Formula Grants Office- State and local government applicants
- Discretionary Grants Office- State and local government applicants
- Training Grants Office- State and local government applicants
- Discretionary Grants Office- Non-government applicants
- Training Grants Office- Non-government applicants

Support Subprocesses Organizations
- Support Contractor A
- Support Contractor B
- Support Contractor C

Improvement Subprocesses Organizations
- ISO 9001: 2000 Improvements Contractor
- CMMI- Staged Improvements Contractor
- CMMI- Continuous Improvements Contractor

Common Subprocesses Organizations
- Support Contractor A
- Support Contractor A

Now: Mostly Cloudy, 55° F   Thu: 66° F   Fri: 68° F   Sat: 76° F   Sun: 79° F   Mon: 79° F   Tue: 76° F

Organizations execute the eight "Play Development" stages.

1) summarizing (descriptions),

2) playwriting (outlines),

3) staging (mockups),

4) dress rehearsal (implementations),

5) performance (implementations),

6) evaluations (implementations),

7) revisions (outlines, mockups, implementations), and

8) closing.

People in organizations provide different views of the subprocesses.
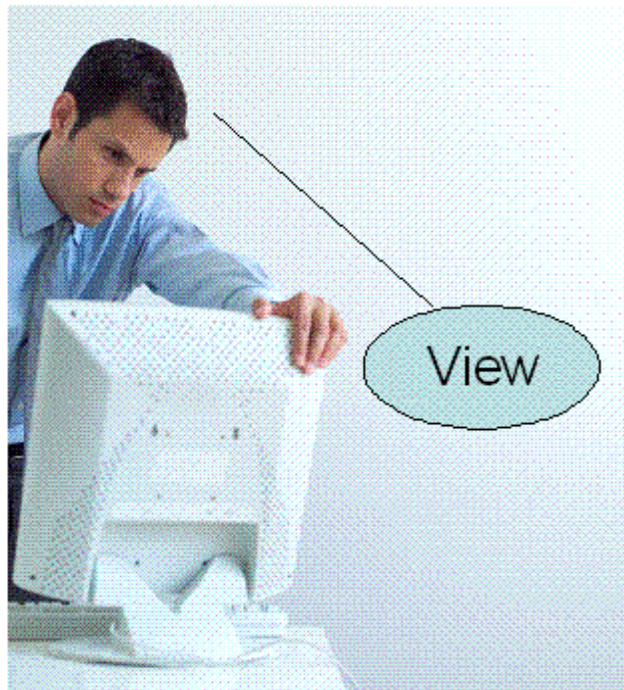
Subprocess Documentor's View

Subprocess Teacher's, Manager's, Implementor's and Participant's Views

Organizations generate
Subprocess Life-Cycle* Views

- **Organization subprocess teachers want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)**

- **Organization subprocess documentors want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)**

- **Organization subprocess managers want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)**

- **Organization subprocess implementors want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)**

- **Organization subprocess participants want to quickly learn, integrate, and perform tasks that are part of their views. (Critical)**

- **Organization subprocess managers want to quickly monitor execution of tasks that are part of their views.**

- **Organization subprocess teachers, documentors, managers, implementors, and participants want to quickly improve, test, and teach their subprocesses.**

- **Organization subprocess teachers, documentors, managers, implementors, and participants want to quickly improve, test, and teach using other organization's views.**

- **Organization subprocess teachers, documentors, managers, implementors, and participants become hurt/angry when their views are not supported.**

- **Organization subprocess implementors want to quickly update, test, and teach tools that help facilitate execution of their subprocesses.**

- **Organization subprocess teachers, documentors, managers, implementors, and participants want to quickly leave when their views continue not to be supported.**

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* Also, called the "Universal Subprocess".

The "Game of Telephone" Syndrome:
Where People Pass-On Only Parts of the
"Message"

Overview of how editable and
cost-saving process documentation tools can solve problems.

Problem	Solution
Develop Internet-based tools to support the paperless documentation and management of complex distributed processes.	Editable process documentation tools can be tailored to each subprocess.
Organizations provide different views of the subprocesses.	Editable process documentation tools can be tailored to reflect different organization's views of the subprocess.
Organizations execute the eight "play development" stages.	Editable process documentation tools can be tailored to reflect the eight "play development" stages.
People in organizations provide different views of the subprocesses.	Editable process documentation tools can be tailored to communicate different people's views of the subprocess.
Organizations generate Subprocess Life-Cycle Views.	Editable process documentation tools can be tailored to reflect different Life-Cycle views of the subprocess.
The "Game of Telephone" Syndrome: Where People Pass-On Only Parts of the "Message".	Editable process documentation tools can be tailored to layer below different people's views of the subprocess.

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- Each organization gets worksheets for its own use. These worksheets also help add to the database as Managers go thru the subprocesses. (e.g., **1**, **2**)

For more information on the Treasury Community Development Financial Institutions Agreements Process Library see: **paper**, **summary**, and **other process libraries**.

Treasury Community Development Financial Institutions Agreements Process Library

Overview (Demo)

Integrated Problems-Solutions Database

Planning Grants

Solicitation Development

Submission

Review and Selection

Negotiation and Award

Administration

Closeout

Post-Closeout

Views

Total 11 Entries

Classification: **Product Realization Subprocesses** (T4-00-00-00)

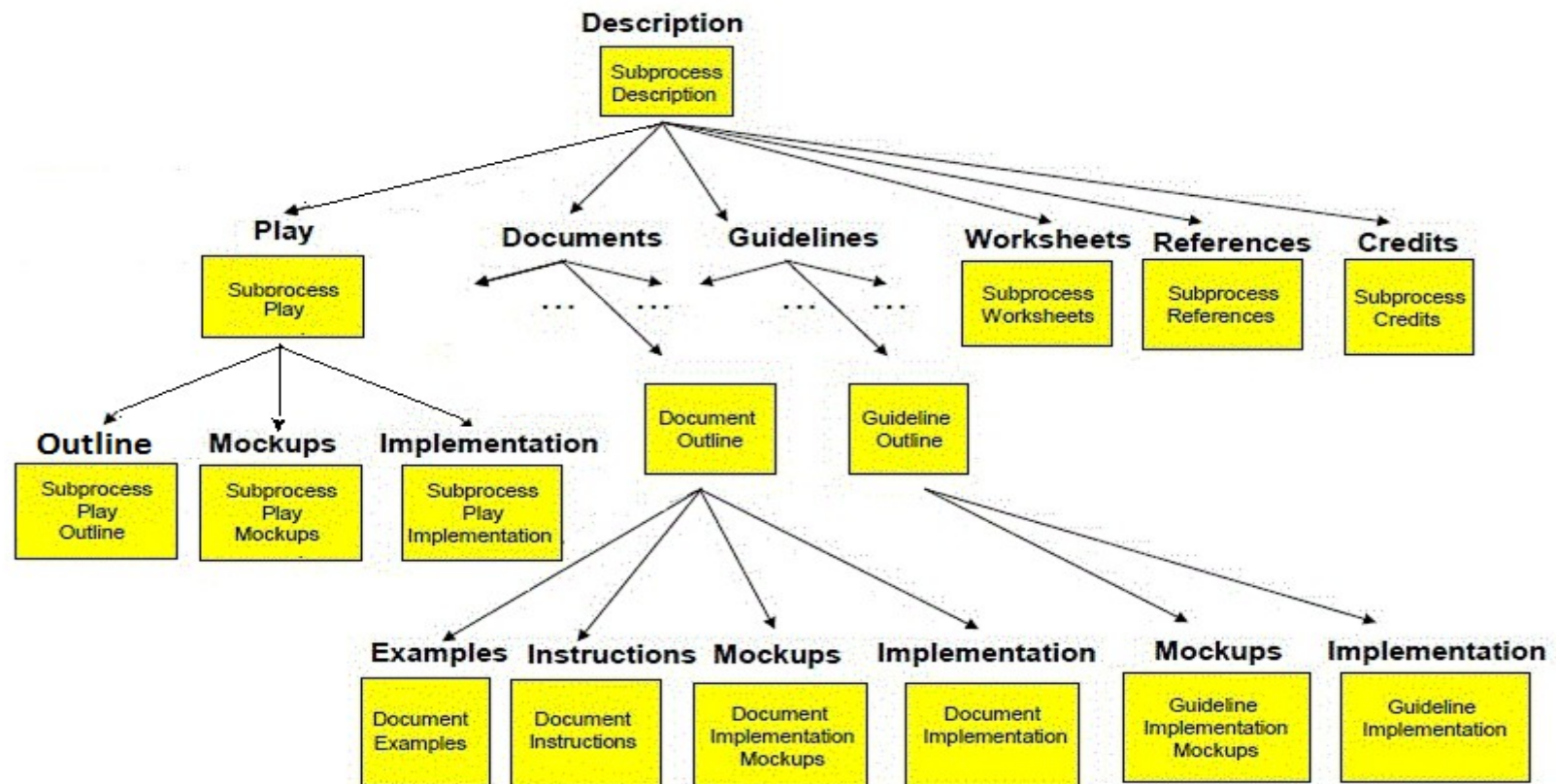Subprocess: **Solicitation Development**   (T4-3-00-00)

Create View

View	Steps
Block Grants Office- State and local government applicants Lee, Geoff (geoff.lee@doj.gov) Fetch	Update Copy Delete
Formula Grants Office- State and local government applicants Bogue, Rodney (rod.bogue@doj.gov) Fetch	Update Copy Delete
Discretionary Grants Office- State and local government applicants Kim, Walter S. (walter.s.kim@doj.gov) Fetch	Update Copy Delete
Training Grants Office- State and local government applicants Chern, Dr. E. James (Engmin.J.Chern@doj.gov) Fetch	Update Copy Delete
Discretionary Grants Office- Non-government applicants Ray, Carl G. (carl.g.ray@doj.gov) Fetch	Update Copy Delete
Training Grants Office- Non-government applicants Schober, Wayne R. (Wayne.R.Schober@jpl.doj.gov) Fetch	Update Copy Delete

Our basic approach is to wrap organization's subprocesses in a common envelope containing "communication vehicles" that facilitate intra- and inter-organization communication.

Description

Subprocess Description

Play

Subprocess Play

Documents   **Guidelines**   **Worksheets**   **References**   **Credits**

...   .

Subprocess Worksheets   Subprocess References   Subprocess Credits

Outline   **Mockups**   **Implementation**   Document Outline   Guideline Outline

Subprocess Play Outline   Subprocess Play Mockups   Subprocess Play Implementation

Examples **Instructions** **Mockups** **Implementation** **Mockups** **Implementation**

Document Examples   Document Instructions   Document Implementation Mockups   Document Implementation   Guideline Implementation Mockups   Guideline Implementation

Solicitation Development

Table of Contents

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1. Overview

In this subprocess, we deal with the process of developing,, reviewing, and distributing the Solicitation..

Organization: ORG

All-Files. These are all the view files.
Benefits

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2. Play

In this subprocess, the play is divided in several parts:

3. Guidelines Development

-Register, Assign, Notify Participants-
Solicitation Development Manager:
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-Update Topic Descriptions-
Topic Manager (Co-Lead) .

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In this subprocess, we have the following document types:

Registrations. These are used to represent user Registrations.
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Solicitation. These are used to represent Solicitations.
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Outreach Records. These are used to represent Outreach Records.

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In this subprocess, we have the following Guidelines:

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Credits. These are the people partaking in this organization's production.

Subprocess Worksheets facilitate subprocess manager communication with process developers and participants.

Subprocess Worksheet

Subprocess: Solicitation Development

In this subprocess, we deal with the process of developing,, reviewing, and distributing the Solicitation..

Organization: Division C

Task	Purpose	Suggested Roles	Task Lead(s)	Estimated Completion Date	Actual Completion Date	Documents					
						Document	Instructions and Samples	Document Lead(s)	Estimated Completion Date	Actual Completion Date	Document Location(s)
Administration	The purpose of this task is to administer Project Development .	Task Lead, Subtask Lead, Subtask Member, Reviewer, Approval Official, Project Manager, Documents Manager	James Green	07/23/07	08/23/07	Document Library	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
Critical Design Review (CDR)	The purpose of this task is to administer Critical Design Review (CDR)..	Task Lead, Subtask Lead, Subtask Member, Reviewer, Approval Official, Project Manager, Documents Manager	James Green	06/23/07	06/23/07	Critical Design Review (CDR)Documents	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Draft Project Requirements Document	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Project Plan	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
Resource Analysis Office	The purpose of this task is to administer Resource	Task Lead, Subtask Lead, Subtask Member, Reviewer,	James			Resource Analysis Office (RAO) Data Dump Documents	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Project Plan	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034

References

"NASA Sets Sights on a 'Paperless' Planet" - **Washington Post**
(Federal Page)

"Justice Department to Use Internet to Help Protect Officers" - **USDOJ Press Release**
(Photograph)

"Over 19,500 Applications Received For Firefighters Grant Program" - USFA Press Release

"Contract Cybernauts" - **Government Executive**

"NASA's Electronic Handbooks Offer Paper-Free Management" - **Federal Computer Week**

"Bulletproof Vests System Wins FGIPC's 1999 GOLD IOSS AWARD" - **FGIPC's Press Release**

"NASA E-Commerce Solution Gains Attention" - **Washington Technology**

"Department of Justice Invests In Goddard Technology" - **Goddard News**

"Utilizing NASA Electronic Handbooks" - **NASA Science Information Systems Newsletter**

"NASA Tames a Paper Beast" - **NASA Tech Briefs**

"Time and Cost Savings Result From Internet Software Tool Developed For Electronic Process Management" - **NASA/GSFC Press Release**

Credits

Program Executives: Harry Johnson, Michael Battaglia, Carl Ray

Program Manager: Paul Mexcur, Robert Nelson

Technology Manager: James Kalshoven

Procurement Managers: Kathy Needham; Karen Huth

Resources Managers: Michael Talley

Infusion Managers: Pam Guzzone, Janet Jew

EHBs Manager: Barry E. Jacobs

Support Contractors: Samidha Manu, Heather Morgan, Aysen Bankeroglu, Mohammed Rahman, Michael Iams, Juanita DeButts

Secretary: Margurette Tallent

ARC Program: Warren Atai, Geoff Lee, Ryszard Pisarski

DFRC Program: Rod Bogue

GRC Program: Walter Kim, Dean Bitler, Gynelle Steele, Marie Metzger, Cindy Dreibelbis

GSFC Program: Don Friedman, James Chern

JPL Program: Pat McGuire, Wayne Shubert; Byron Jackson

JSC Program: Grady Henderson, Terry Hess, Jane Fox, Kumar Krishen, James Whittington

KSC Program: Jim Aliberiti, Charles Griffin

LaRC Program: Thayer Sheets, Fred Morell, Robert L. Yang

MSFC Program: Helen C. Stinson; Lynn Garrison

SSC Program: James Bryant

Tools that can be focused on during stages- by tool.

File   Edit   View   History   Bookmarks   Tools   Help

ehbs.org/intro/summary/stages1.html   Google

Tools To Focus On During Stages- By Tool.

Tool	Process Developer	Process Participant
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Plays	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Documents	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Role Guidelines/EHBs	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Subprocess Worksheets	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
References	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together
Credits	Learn, Integrate, Test, Teach, Work Together	Learn, Integrate Documents Using Role Guidelines/EHBs, Test, Teach, Work Together

Tools that can be focused on during stages- by stage.

File Edit View History Bookmarks Tools Help
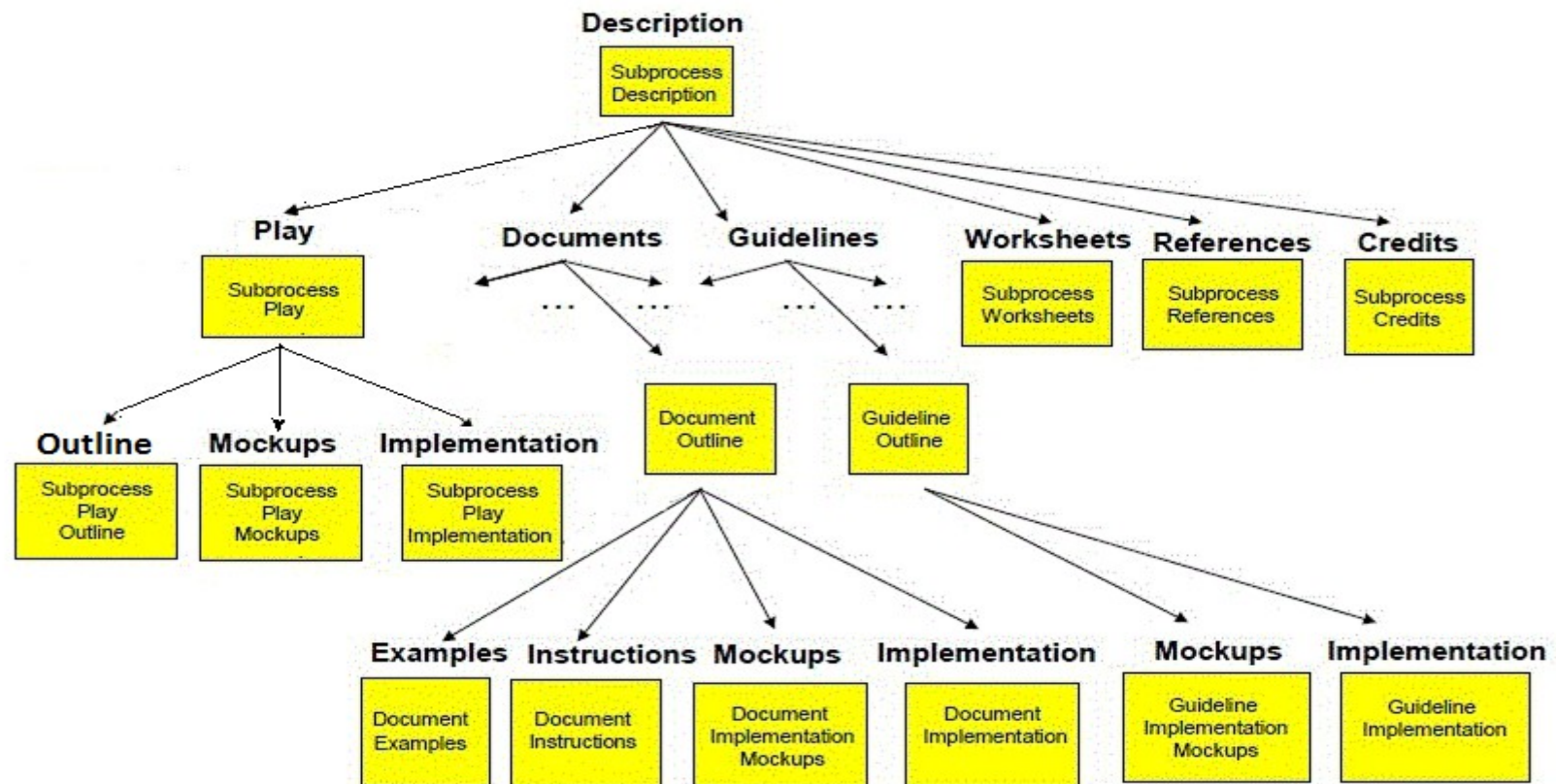
ehbs.org/intro/summary/stages2.html

Google

Tools To Focus On During Stages- By Stage.

Stage	Process Developer	Process Participant
Learn	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.
Integrate	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Documents Using Role Guidelines/EHBs.
Test	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.
Teach	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.
Work Together	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.	Descriptions, Plays, Documents, Role Guidelines/EHBs, Subprocess Worksheets, References, and Credits.

Our basic approach is to wrap organization's subprocesses in a common envelope containing "communication vehicles" that facilitate intra- and inter-organization communication.

Description

| Subprocess Description |

Play

| Subprocess Play |

Documents **Guidelines**

… …   … …

Worksheets **References** **Credits**

| Subprocess Worksheets | | Subprocess References | | Subprocess Credits |

Outline **Mockups** **Implementation**

| Subprocess Play Outline | | Subprocess Play Mockups | | Subprocess Play Implementation |

| Document Outline | | Guideline Outline |

Examples **Instructions** **Mockups** **Implementation** **Mockups** **Implementation**

| Document Examples | | Document Instructions | | Document Implementation Mockups | | Document Implementation | | Guideline Implementation Mockups | | Guideline Implementation |

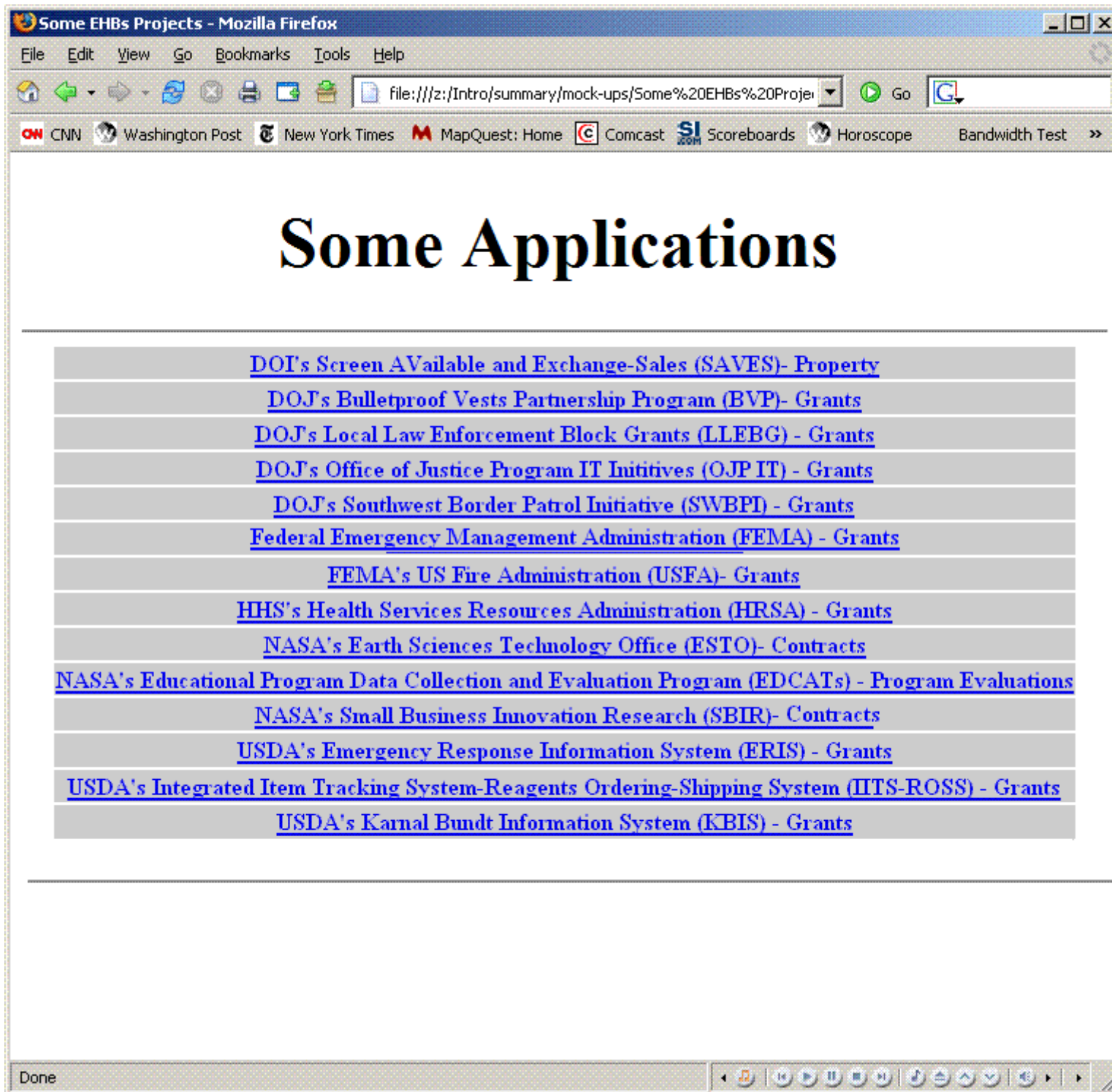# Process Libraries (PLs) and Electronic Handbooks (EHBs) are where Shakespeare meets Freud

- In Process Libraries (PLs), subprocesses are represented as "plays" where "actors" communicate thru the Internet. Each organization puts on its own "productions". For each role, Electronic Handbooks (EHBs) (also called Guidelines) guide "actors" thru their parts. Managers are "directors" using Worksheets as learning/management tools. Documentors serve as "playwrights". [Shakespearean]

- Organizations are represented as "families" having "multiple personalities". Subprocess "plays" and its "components" provide communication vehicles between members of the same family, different families, and families from different subprocesses. Documentors also serve as "family therapists". [Freudian]

The approach uses a modernization of the Socratic Method or Dialogue to gain consensus between Teachers, Documentors, Managers, Implementors, and Participants

Some Applications

[DOI's Screen AVailable and Exchange-Sales (SAVES)- Property](#)

[DOJ's Bulletproof Vests Partnership Program (BVP)- Grants](#)

[DOJ's Local Law Enforcement Block Grants (LLEBG) - Grants](#)

[DOJ's Office of Justice Program IT Inititives (OJP IT) - Grants](#)

[DOJ's Southwest Border Patrol Initiative (SWBPI) - Grants](#)

[Federal Emergency Management Administration (FEMA) - Grants](#)

[FEMA's US Fire Administration (USFA)- Grants](#)

[HHS's Health Services Resources Administration (HRSA) - Grants](#)

[NASA's Earth Sciences Technology Office (ESTO)- Contracts](#)

[NASA's Educational Program Data Collection and Evaluation Program (EDCATs) - Program Evaluations](#)

[NASA's Small Business Innovation Research (SBIR)- Contracts](#)

[USDA's Emergency Response Information System (ERIS) - Grants](#)

[USDA's Integrated Item Tracking System-Reagents Ordering-Shipping System (IITS-ROSS) - Grants](#)

[USDA's Karnal Bundt Information System (KBIS) - Grants](#)

Subprocess Life-Cycle Views that are supported.

- **Organization subprocess teachers want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)** Organization subprocess teachers copy relevant organization subprocess Plays/Documents/Guidelines/Worksheets in the Process Library and then learn, integrate, test, and teach their new organization subprocess Plays/Documents/Guidelines /Worksheets.

- **Organization subprocess documentors want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)** Organization subprocess documentors copy relevant organization subprocess Plays/Documents/Guidelines/Worksheets in the Process Library and then learn, integrate, test, and teach their new organization subprocess Plays/Documents/Guidelines /Worksheets.

- **Organization subprocess managers want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)** Organization subprocess managers copy relevant organization subprocess Plays/Documents/Guidelines/Worksheets in the Process Library and then learn, integrate, test, and teach their new organization subprocess Plays/Documents/Guidelines /Worksheets.

- **Organization subprocess implementors want to quickly learn, integrate, test, and teach their own views of their subprocesses. (Critical)** Organization subprocess implementors copy relevant organization subprocess Plays/Documents/Guidelines/Worksheets in the Process Library and then learn, integrate, test, and teach their new organization subprocess Plays/Documents /Guidelines/Worksheets.

- **Organization subprocess participants want to quickly learn, integrate, and perform tasks that are part of their views. (Critical)** Organization subprocess participants study the steps of their organization subprocess view Guidelines.

- **Organization subprocess managers want to quickly monitor execution of tasks that are part of their views.** Organization subprocess managers monitor the execution of tasks using their organization subprocess Plays/Documents/Guidelines/Worksheets.

- **Organization subprocess teachers, documentors, managers, implementors, and participants want to quickly update, test and teach their subprocesses.** Organization subprocess teachers, documentors, managers, implementors, and participants update, test, and teach their organization subprocess Plays/Documents/Guidelines/Worksheets.

- **Organization subprocess teachers, documentors, managers, implementors, and participants want to quickly update, test, and teach using other organization's views.** Organization subprocess teachers, documentors, managers, implementors, and participants update, test, and teach using other relevant organization subprocess Plays/Documents/Guidelines/Worksheets in the Process Library.

- **Organization subprocess teachers, documentors, managers, implementors, and participants become hurt/angry when their views are not supported.** Organization subprocess teachers, documentors, managers, implementors, and participants update, test, and teach their organization subprocess Plays/Documents/Guidelines/Worksheets.

- **Organization subprocess implementors want to quickly update, test and teach tools that help facilitate execution of their subprocesses.** Organization subprocess implementors update, test, and teach tools using requirements from Plays/Documents/Guidelines/Worksheets in the Process Library.

- **Organization subprocess teachers, documentors, managers, implementors, and participants want to quickly leave when their views continue not to be supported.** Organization subprocess teachers, documentors, managers, implementors, and participants archive their organization subprocess Plays/Documents/Guidelines/Worksheets.

- **The Key Human Factor Issue: Communication Within and Across Organizations.** Organization subprocess Plays/Documents/Guidelines/Worksheets in Process Libraries facilitate intra- and inter- organization communication.

Basic People Principles that are supported.

- **Subprocesses determine tools.** The approach supports people doing their jobs as they see it. Forcing additional tools on people only adds more burdens to their jobs and they will likely ignore them. Additional requirements should be integrated into existing subprocesses.

- **Everyone's subprocesses should be supported as best as possible.** The approach supports people seeing their jobs differently. This is often a good thing for subprocess improvement.

- **Tools are role-based so that data is collected during subprocess execution.** As people partake in the subprocesses, the approach supports data entry in the system. If data collection is done after the fact, the quality of the data generally suffers.

- **Tools are people-based so that users require minimal training.** The approach helps people to determine which steps to use. For each of the substeps (i.e., forms and documents), the approach should have clear templates, instructions, and samples.

- **Tools are web-based so that users can easily partake.** The web-based approach supports the reduced need to install special software on user's computers. This is especially important in the case where the number of participants is large.

- **Everyone helps build the tools.** The approach supports joint ownership in the subprocesses and the underlying systems which is crucial for overall acceptance.

Subprocess/Play Developments that are supported.

- **Presentation & Paper/Marketing.** The approach supports presentation & paper/marketing using the contents of Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.

- **Worksheet/Outlining.** The approach supports worksheet/outlining using the drafting of Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.

- **Temporal Flow/Playwriting.** The approach supports temporal flow/playwriting using the drafting of Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.

- **Examples/Rehearsal.** The approach supports examples/rehearsals using the mockups of Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.

- **Implementation/Staging.** The approach supports implementation/staging using the building of Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.

- **Utilization/Performance.** The approach supports users utilization/performance using execution of Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.

- **Revision/New Production.** The approach supports revision/new production using updates of the Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.

- **Closeout/End Production.** The approach supports closeout/ end performance using storage of the Descriptions, Plays, Documents, Guidelines, Worksheets, Contacts, References, and Credits.

Process Library Operations that are supported.

- **Organization Subprocess Formulation.** The approach supports the introduction of new organizations and their subprocesses into the library.

- **Organization Subprocess Implementation.** The approach supports implementation of common tools for organizations in the library.

- **Organization Subprocess Customer Support.** The approach supports user requests for the library.

- **Organization Subprocess Evaluation.** The approach supports organization subprocess evaluations.

- **Organization Subprocess Update.** The approach supports the updating of organizations and their subprocesses in the library.

- **Organization Subprocess Closeout**. The approach supports the closeouts of organizations and their subprocesses from the library.

Overview of Treasury Community Development Financial Institutions Agreements Process Library

The objective of this tool is to help Treasury Community Development Financial Institutions Agreements Managers (and Staff) to *quickly learn* to build and manage Agreements. We present our approach in five bullets.

- **We focus on the documents that Treasury Community Development Financial Institutions Agreements Managers prepare. These documents appear within various subprocesses (e.g., 1) and within multiple organizations (e.g., 2).**

- **For each subprocess, we create a directory of documents for that subprocess. (e.g., 1, 2)**

- **For each document type, we create files to help prepare the document. These files include document overview, organization, related links, structure, references, organization samples, organization contacts, and *sample documents from other organizations*. (e.g., 1, 2)**

- **Sample documents have three levels of access: a) Unconditionally Distributable (e.g., 1, 2), b) Maintained In Organization Libraries (e.g., 1, 2), and c) Proprietary (e.g., 1, 2).**

- **Each organization gets worksheets for its own use. These worksheets also help add to the database as Managers go thru the subprocesses. (e.g., 1, 2)**

For more information on the Treasury Community Development Financial Institutions Agreements Process Library see: paper, summary, and other process libraries.

Solicitation

Document

Overview

The purpose of Solicitation is to provide Solicitation documents for the Solicitation Development subprocess.

Organization: ORG

Document

Template (doc)
Example(s) (html)
Instructions (html)

Implementation:

Mockup (html)
Implementation (html)

Contacts:

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Organization: ORG

Document

Template (doc)
Example(s) (html)
Instructions (html)

Implementation:

Mockup (html)
Implementation (html)

Contacts:

Name- Phone-Email (mailto-hyperlink)

References:

Title- Author- Library (html)

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file:///E:/8000-8999/dhs/summary/mock-ups/Integrations.htm

CNN   Wash Post   NY Times   Horoscope   Scoreboards   NASAFCU   Comcast   Bandwidth   File Hippo   ZDNet   »

Fetch Integration

Read Integration	
Classification	Product Realization Subprocesses
Subprocess	Solicitation Development
Type	Guidelines
Title	Subprocess Manager
Id	T4-4-3-00
Integration Url	Fetch
Ordinal	33
Date Created	03-MAY-2005
Date Updated	18-MAY-2005

Samples From Views	
Block Grants Office- State and local government applicants Fetch - (Size: 10 KB)	Date Created: 23-Jun-2005 Date Updated: 23-Jun-2005
Formula Grants Office- State and local government applicants Fetch - (Size: 10 KB)	Date Created: 23-Jun-2005 Date Updated: 23-Jun-2005
Discretionary Grants Office- State and local government applicants Fetch - (Size: 10 KB)	Date Created: 23-Jun-2005 Date Updated: 23-Jun-2005
Training Grants Office- State and local government applicants Fetch - (Size: 10 KB)	Date Created: 23-Jun-2005 Date Updated: 23-Jun-2005
Discretionary Grants Office- Non-government applicants	Date Created: 23-Jun-2005 Date Updated: 23-Jun-2005

Done   0.940s   McAfee SiteAdvisor ▾   Adblock

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For more information on the Treasury Community Development Financial Institutions Agreements Process Library see: **paper**, **summary**, and **other process libraries**.

Documents in Process Libraries have three levels of access.

- **Unconditionally Distributable Documents.** Here the document's hyperlink will point directly to the organization's document.

- **Documents (On-Line/Off-Line) Maintained In Organization Libraries.** Here the document's hyperlink will point into the organization's library maintaining the document.

- **Proprietary Documents.** Here the document's hyperlink will point to the organization's person/persons responsible for the document from whom permission must be obtained.
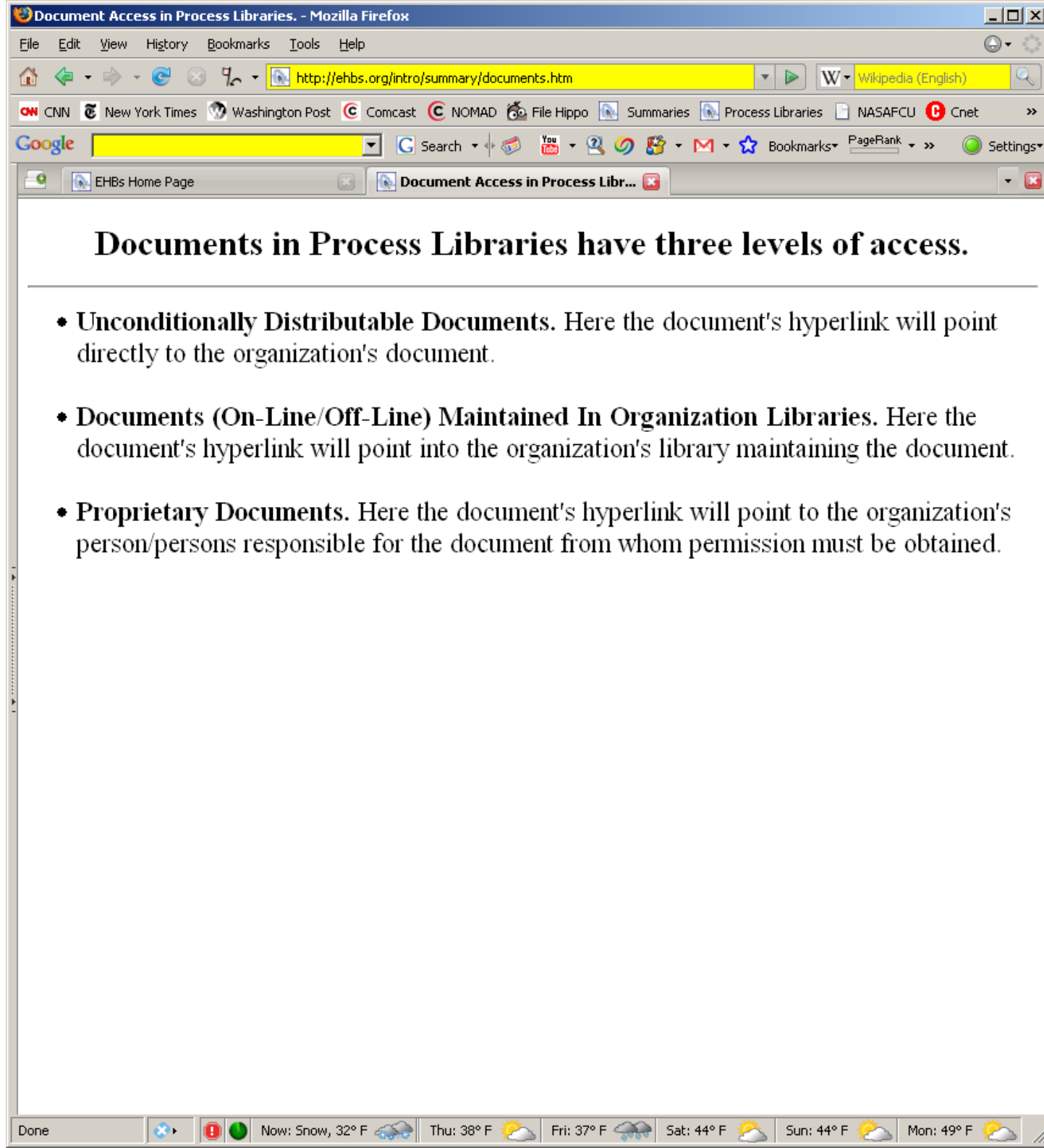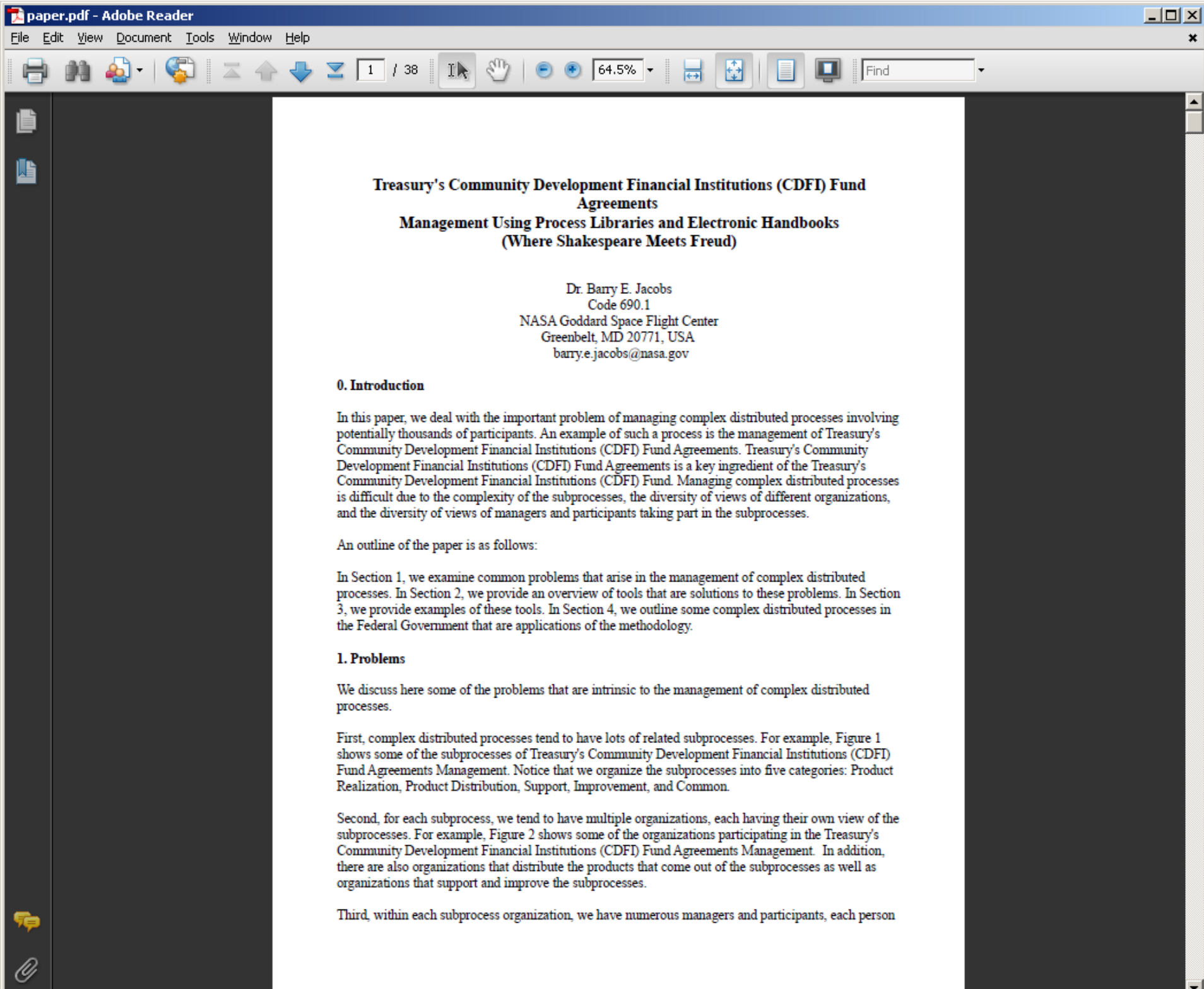
Treasury's Community Development Financial Institutions (CDFI) Fund Agreements
Management Using Process Libraries and Electronic Handbooks
(Where Shakespeare Meets Freud)

Dr. Barry E. Jacobs
Code 690.1
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0. Introduction

In this paper, we deal with the important problem of managing complex distributed processes involving potentially thousands of participants. An example of such a process is the management of Treasury's Community Development Financial Institutions (CDFI) Fund Agreements. Treasury's Community Development Financial Institutions (CDFI) Fund Agreements is a key ingredient of the Treasury's Community Development Financial Institutions (CDFI) Fund. Managing complex distributed processes is difficult due to the complexity of the subprocesses, the diversity of views of different organizations, and the diversity of views of managers and participants taking part in the subprocesses.

An outline of the paper is as follows:

In Section 1, we examine common problems that arise in the management of complex distributed processes. In Section 2, we provide an overview of tools that are solutions to these problems. In Section 3, we provide examples of these tools. In Section 4, we outline some complex distributed processes in the Federal Government that are applications of the methodology.
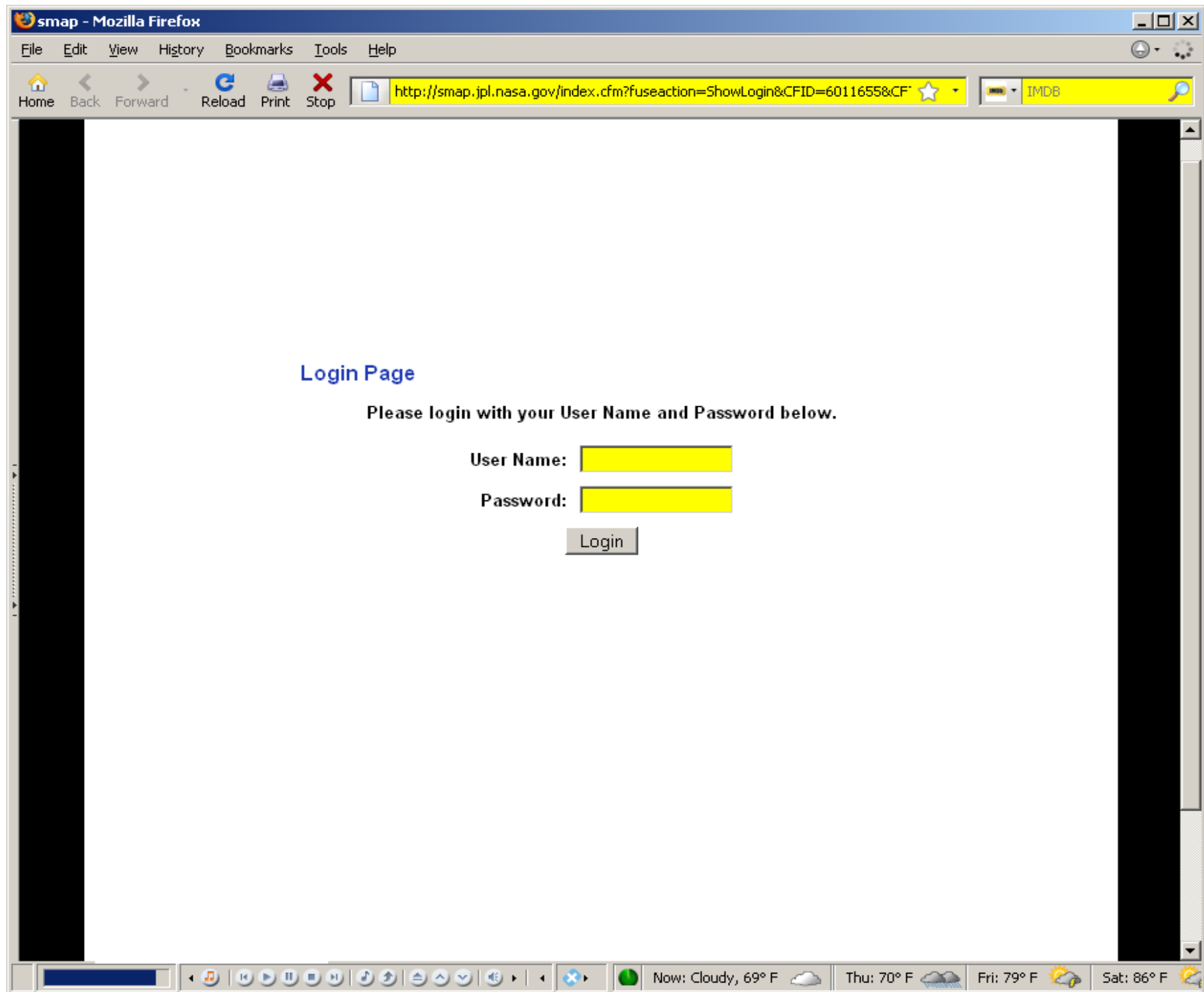
1. Problems

We discuss here some of the problems that are intrinsic to the management of complex distributed processes.

First, complex distributed processes tend to have lots of related subprocesses. For example, Figure 1 shows some of the subprocesses of Treasury's Community Development Financial Institutions (CDFI) Fund Agreements Management. Notice that we organize the subprocesses into five categories: Product Realization, Product Distribution, Support, Improvement, and Common.

Second, for each subprocess, we tend to have multiple organizations, each having their own view of the subprocesses. For example, Figure 2 shows some of the organizations participating in the Treasury's Community Development Financial Institutions (CDFI) Fund Agreements Management. In addition, there are also organizations that distribute the products that come out of the subprocesses as well as organizations that support and improve the subprocesses.

Third, within each subprocess organization, we have numerous managers and participants, each person

File Edit View History Bookmarks Tools Help

Home Back Forward Reload Print Stop http://smap.jpl.nasa.gov/index.cfm?fuseaction=ShowLogin&CFID=6011655&CF IMDB

Login Page

Please login with your User Name and Password below.

User Name:

Password:

Login

Now: Cloudy, 69° F   Thu: 70° F   Fri: 79° F   Sat: 86° F

Compose: Please send me a copy of your project's proprietary MDR Package

File   Edit   View   Insert   Format   Options   Tools   Help

Send   Contacts   Spell   Attach   Security   Save

From: Barry E. Jacobs <barry.e.jacobs@nasa.gov>   - BEJ@nasa

To: Mary.T.Smith@jpl.nasa.gov

To:

Subject: Please send me a copy of your project's proprietary MDR Package

Preformat   Variable Width   A A **B** *I* U

Please send me a copy of your project's proprietary:

Package

Thanks,

Barry

--
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Subprocess Worksheet

Subprocess: Solicitation Development

In this subprocess, we deal with the process of developing,, reviewing, and distributing the Solicitation..

Organization: Division C

Task	Purpose	Suggested Roles	Task Lead(s)	Estimated Completion Date	Actual Completion Date	Documents					
						Document	Instructions and Samples	Document Lead(s)	Estimated Completion Date	Actual Completion Date	Document Location(s)
Administration	The purpose of this task is to administer Project Development .	Task Lead, Subtask Lead, Subtask Member, Reviewer, Approval Official, Project Manager, Documents Manager	James Green	07/23/07	08/23/07	Document Library	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
Critical Design Review (CDR)	The purpose of this task is to administer Critical Design Review (CDR)..	Task Lead, Subtask Lead, Subtask Member, Reviewer, Approval Official, Project Manager, Documents Manager	James Green	06/23/07	06/23/07	Critical Design Review (CDR)Documents	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Draft Project Requirements Document	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Project Plan	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
Resource Analysis Office	The purpose of this task is to administer Resource	Task Lead, Subtask Lead, Subtask Member, Reviewer,	James			Resource Analysis Office (RAO) Data Dump Documents	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034
						Project Plan	Instructions and Samples	James Green	06/23/07	07/23/07	Library: NS2034

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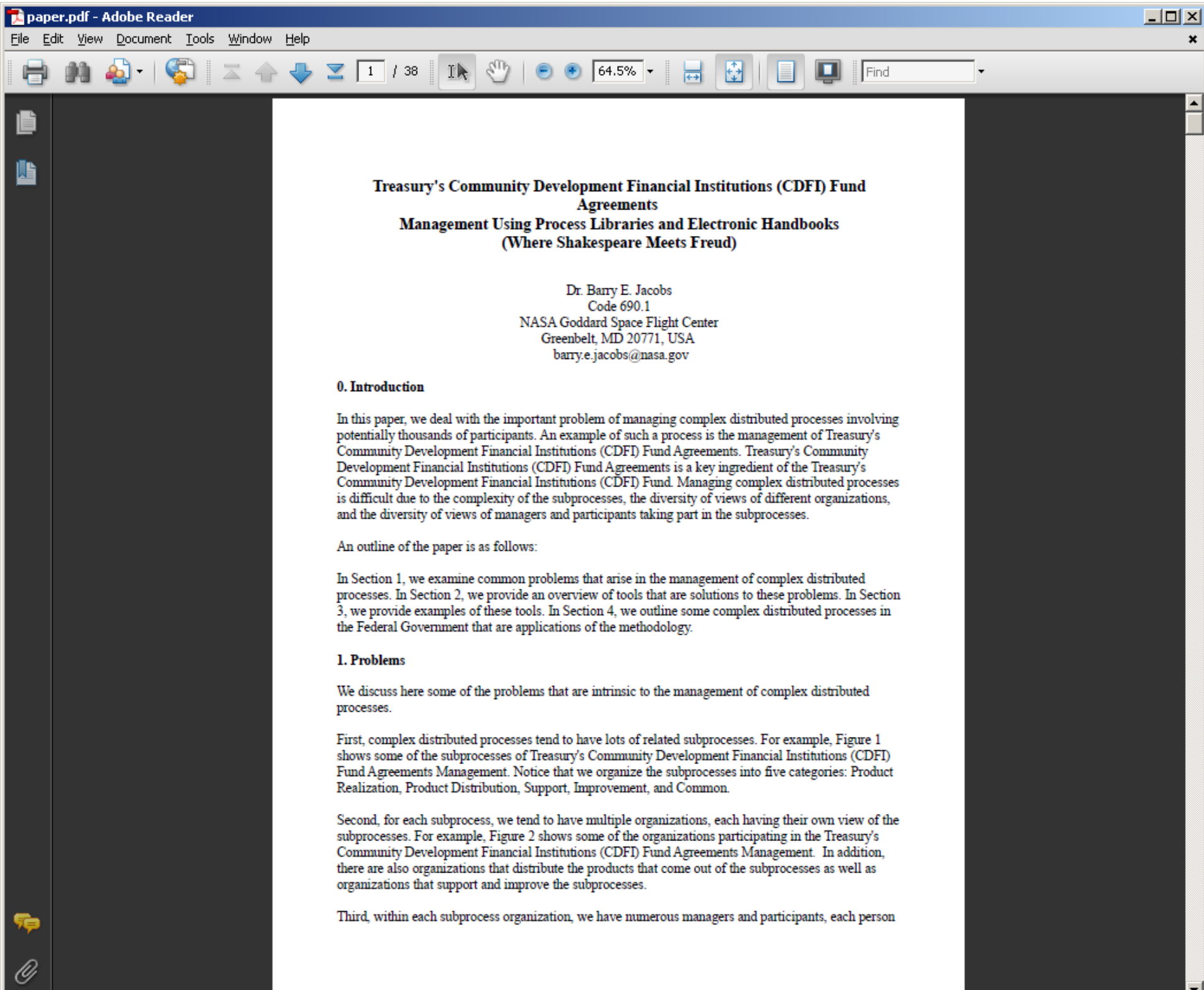
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Third, within each subprocess organization, we have numerous managers and participants, each person

Treasury's Community Development Financial Institutions (CDFI) Fund Agreements Management Using Process Libraries and Electronic Handbooks

(Where Shakespeare Meets Freud)

Summary

(Click Here for: PDF, PPT)
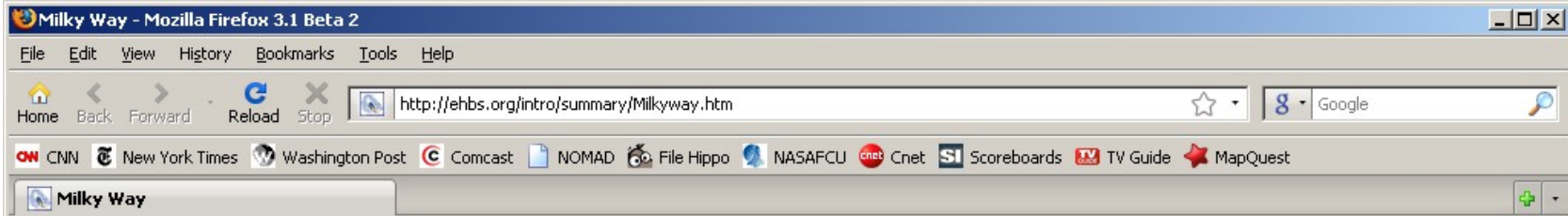(Quick Summary)
(Paper)
(Demonstration)
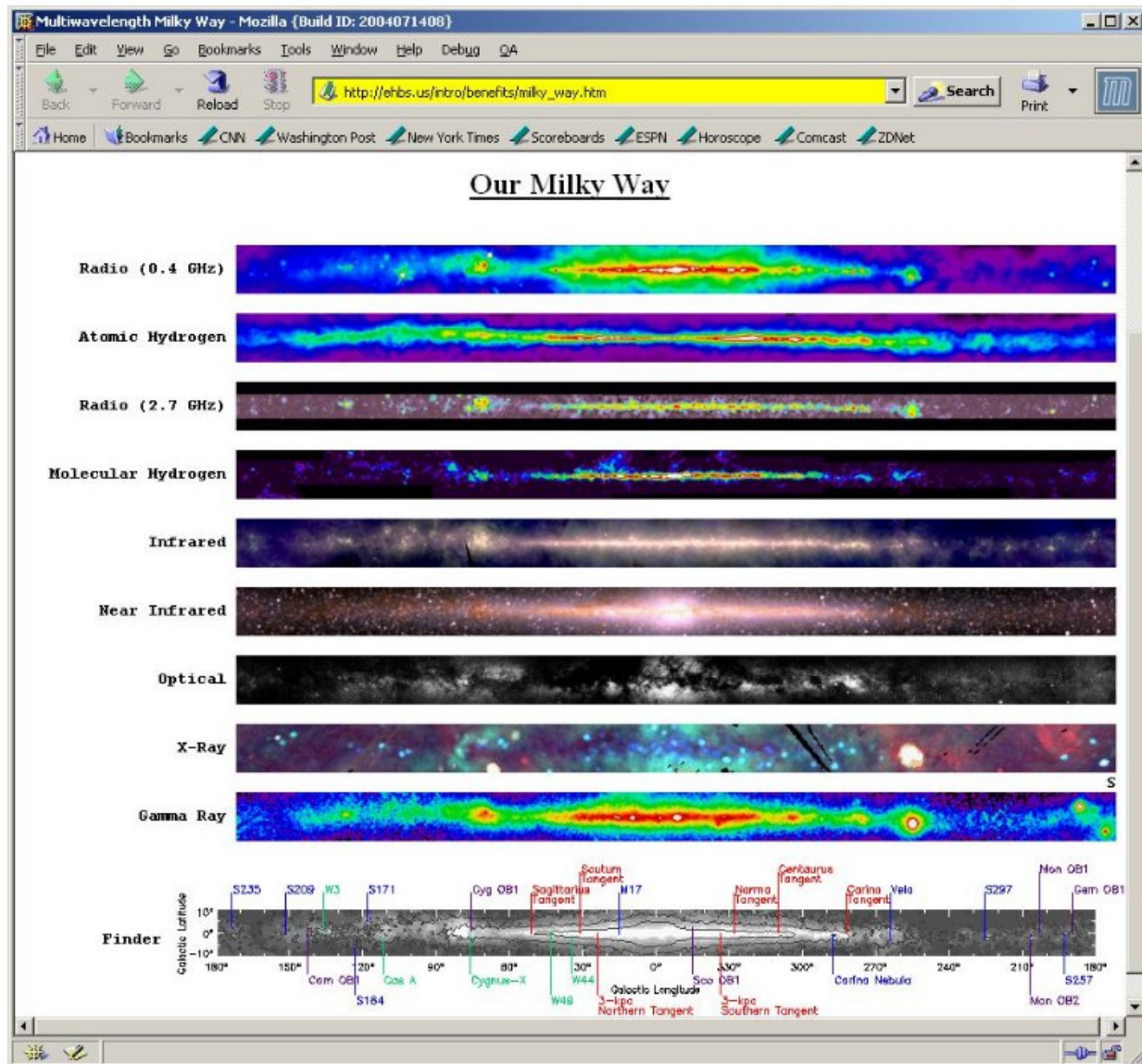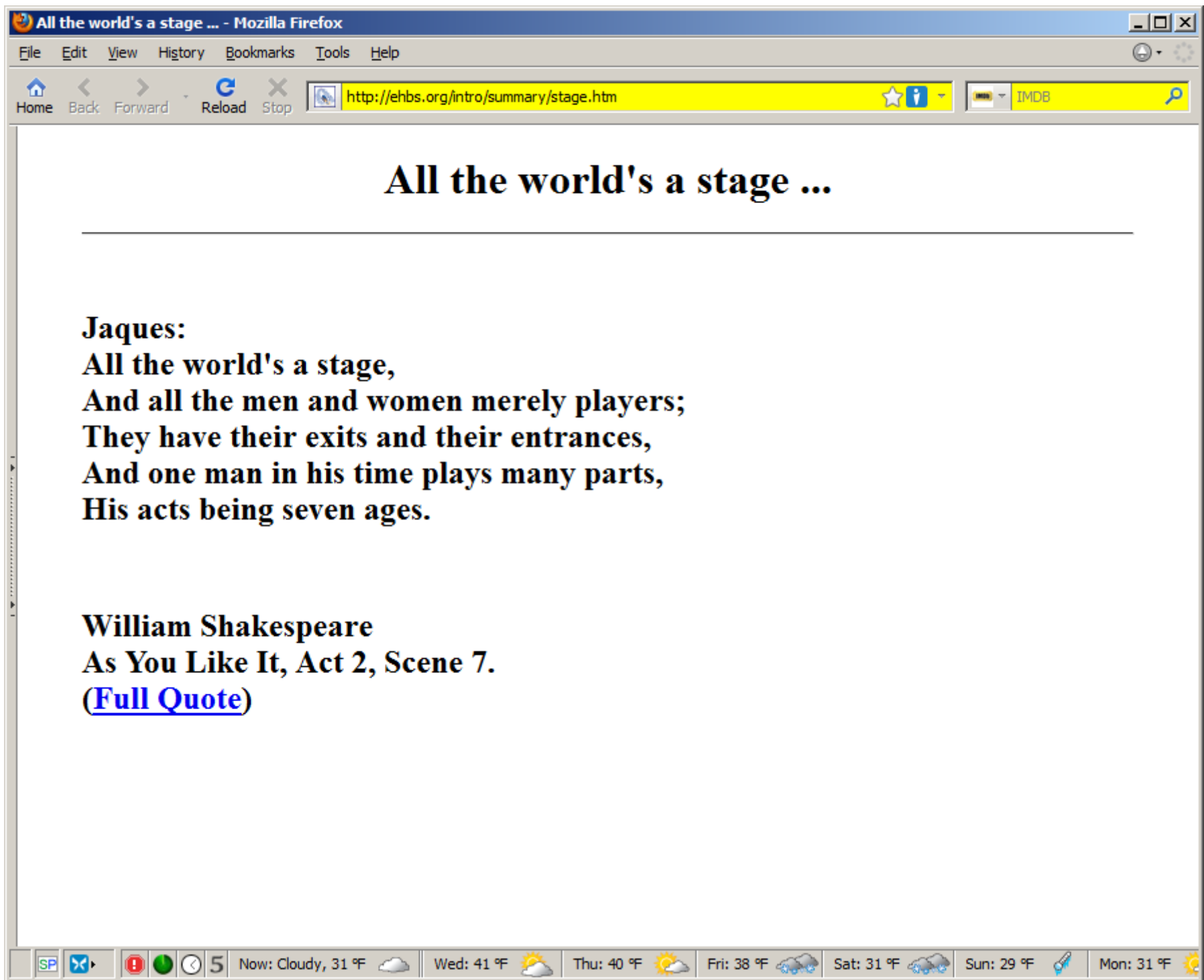(Subprocesses and Their Documentations)
(Demonstration Tool)
(Home Page)

- Cover
- The Bottom Line: Provide editable and cost-saving process documentation tools for process developers and participants to help them quickly and effectively learn, adapt, test, teach, and work together. These tools may be added to new or existing systems.
- Objective: Develop Internet-based tools to support the paperless documentation and management of complex distributed processes.
- Plays describe subprocess execution.
- Our basic approach is to wrap organization's subprocesses in a common envelope containing "communication vehicles" that facilitate learning plus intra-organization communication.
- Outline of Presentation.
- Objective: Develop Internet-based tools to support the paperless documentation and management of complex distributed processes.
- Plays describe subprocess execution.
- Organizations provide different views of the subprocesses, some of which may be proprietary.
- People in organizations provide different views of the subprocesses.
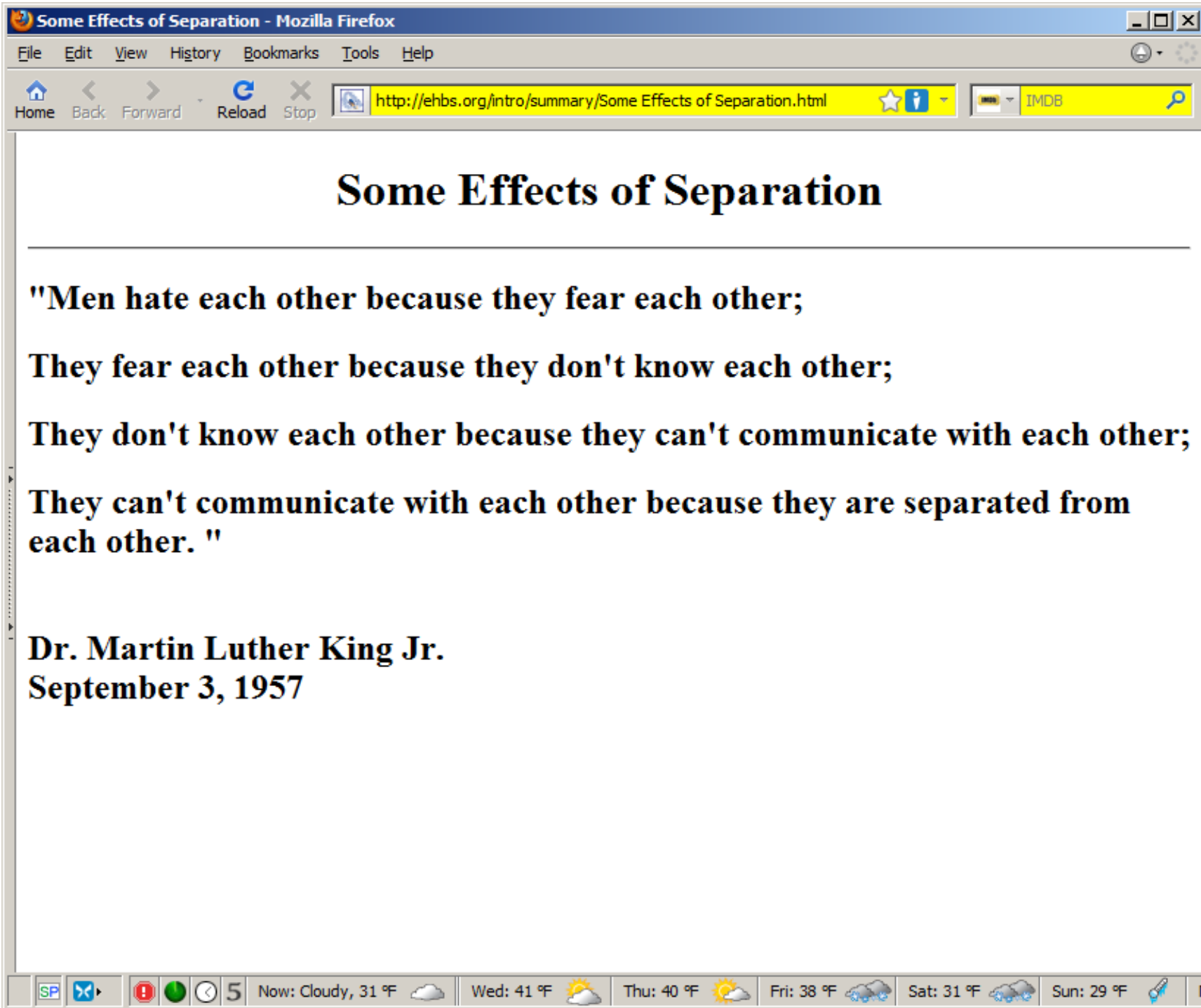- Organizations generate Subprocess Life-Cycle Views.

We believe that to truly understand one's universe, one must see it thru multiple "eyes" and also have tools to "communicate" these views.

Our Milky Way

Radio (0.4 GHz)

Atomic Hydrogen

Radio (2.7 GHz)

Molecular Hydrogen

Infrared

Near Infrared

Optical

X-Ray

Gamma Ray

Finder

All the world's a stage ...

Jaques:
All the world's a stage,
And all the men and women merely players;
They have their exits and their entrances,
And one man in his time plays many parts,
His acts being seven ages.

William Shakespeare
As You Like It, Act 2, Scene 7.
([Full Quote](#))

Some Effects of Separation

"Men hate each other because they fear each other;

They fear each other because they don't know each other;

They don't know each other because they can't communicate with each other;

They can't communicate with each other because they are separated from each other. "

Dr. Martin Luther King Jr.
September 3, 1957

Theatre of Dionysus- Athens, Greece

For More Details