



**U.S. Department of the Interior**  
**"To-Be" Trust Business Model**  
**Process Template**

<b>Title: Develop and Maintain the Project Plan and Schedule</b>	<b>Process Number</b> ____ <b>P.2.1.2</b> ____
<i>Identify the process in the "Verb Noun" format. (Ex: Maintain Ownership)</i>	

**1. Process Definition** *Provide an overview of the process and define its starting and ending points*

<b>1.1 Starts With</b>	The plan timeframe and budget is approved.
<b>1.2 Process Overview</b>	The Staff Planner documents the work plan, the communication plan and the work schedule. When resources, both funding and personnel, have been committed, the plan and schedule may be adjusted to better synchronize with the resources made available. At some later date, if it is determined that the plan and schedule are no longer viable due to changes in the scope of work, the documentation may be adjusted accordingly.
<b>1.3 Stops With</b>	An accurate work plan and schedule that reflects major milestones and deliverable due dates.

**2. Trust Business Objectives** *Identify the Comprehensive Trust Model strategic goals and business objectives to which this process contributes.*

<b>Goal/Objective</b>
Goal 4: Land and natural resources management that maximizes return while meeting beneficiary desires
Objective 4.1 Land and natural resource asset plans and stewardship strategies: Develop land and natural resource asset plans and stewardship strategies.
Objective 4.2 Preservation and protection of land and natural resource assets: Preserve and protect the long-term viability of land and natural resource assets consistent with fiduciary duties and with the beneficiaries' intended use of the assets.
Objective 4.3 Land and natural resource asset business management: Manage land and natural resource assets effectively and proactively to obtain fair market value for beneficiaries and to incorporate beneficiary requirements.

**3. How should Beneficiaries be involved in this process?**

<b>Beneficiary Involvement</b>
Beneficiaries may determine when the plan must be complete. A tribe may contract the planning function.



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**4. Organizations, Offices and Roles.** *Identify the DOI organizations and related roles that should be involved in performing the process.*

**4.1 DOI Organizations.** *Identify the DOI organizations, offices and individual roles that contribute to this process. DOI organizations include the Office of the Secretary, BIA, OST, BLM, MMS, OHA, and OSM among others. Offices include Central Offices, Regional Offices, Agency (Field) Offices, State Offices, etc. All individual roles that contribute, in a significant manner, should be identified.*

Organization	Office	Role	Contribution
Tribes	Tribal Office		Contract or compact the planning function. Provide input to the plan goals and objectives.
BIA	Regional Office Agency/Field Office		Develop and maintain the planning project schedule

**4.2 External Organizations.** *Identify the non-DOI organizations that support the execution or control of this process.*

External Organization	Contribution
None	

**5. Event(s)** *Identify the events or conditions that start the process. Describe each event and indicate the frequency (daily, monthly, quarterly, etc.) in which each event is expected to occur. An event may be an external interaction (a beneficiary submits an application), the expiration of a period of time (a lease is due to expire in 90 days), or the realization of some pre-defined threshold (an IIM account reaches the automatic disbursement threshold).*

Event	Description	Estimated Frequency
	The work plan or schedule needs to be revised for a variety of reasons, such as a change in resource commitments. All money required is not available and may alter the schedule.	



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**6. Inputs and Outputs.** *Identify and describe all inputs and outputs related to this process. Inputs are information or materials used during the execution of the process; outputs are materials or information produced by the process.*

**6.1 Inputs**

Input	Description
Plan purpose and intended use	
Resources required	People and budget

**6.2 Outputs**

Output	Description
Work plan and schedule	Timelines set for implementation of planning process

**7. Fiduciary and Legal Obligations and Controls**

**7.1 Obligations**

*Identify and describe the legal and fiduciary obligations that impact this process. For each obligation, indicate the document or commitment that defines the obligation and the citation (paragraph or section) within the document that pertains to this process.*

Obligation	Source	Business Impact
See Schedule 1 Attached		

**7.2 Controls**

*Identify and describe any controls (enforcement mechanisms) that may be used to ensure that the process adheres to obligations and internal process requirements. Controls may be reviews, audits, segregated duties, etc. Indicate the reason that each control should be introduced (name the obligation that a control is intended to enforce; indicate any controls required to ensure consistency or reliability).*

Control	Reason	Description
Staff Planner develops and maintains a work plan and schedule that accurately reflects planning team progress.	Ensure reliability and consistency.	



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**8. Mechanisms (Systems of Record)** *Identify the mechanisms, or systems, that are needed to support the process (ex: Ownership, Leasing, Workflow Management, Office Filing System, etc.). Indicate the information and activities, relevant to this process that each system supports.*

System Name	Support
Project management software	Ability to develop and maintain a project timeline at the task level and assign resources.

**9. Inter-Process Relationships** *Identify other trust processes that are related to this process (either predecessors or successors). If applicable, indicate the condition under which the processes are related.*

**9.1 Predecessors.** *Predecessors are processes that either produce information required by this process or that result in the need to execute this process.*

Process No.	Name	Condition of Relationship
P.2.1.1	Request Resources	Synchronize the budget and personnel requested with the project plan and schedule.

**9.2 Successors.** *Successors are processes that either use information produced by this process or that must be executed as a result of performing this process.*

Process No.	Name	Condition of Relationship
P.2..2.1	Understand the Beneficiary's Intent	When the resources have been committed and the project plan and schedule have been synchronized, the planning team is ready to begin work.
P.2.1.1	Request Resources	Synchronize the budget and personnel requested with the project plan and schedule.

**10. Comments** *Summarize any discussion, problems, issues or recommendations that should be considered when reviewing process performance. Category Values (Note, Best Practice, Decision, Problem, Issue, Recommendation)*

Category	Comment
	None