PWA TEMPLATE REVISIONS

VDOT Virginia Department of Transportation

Project Management Office

April 2020

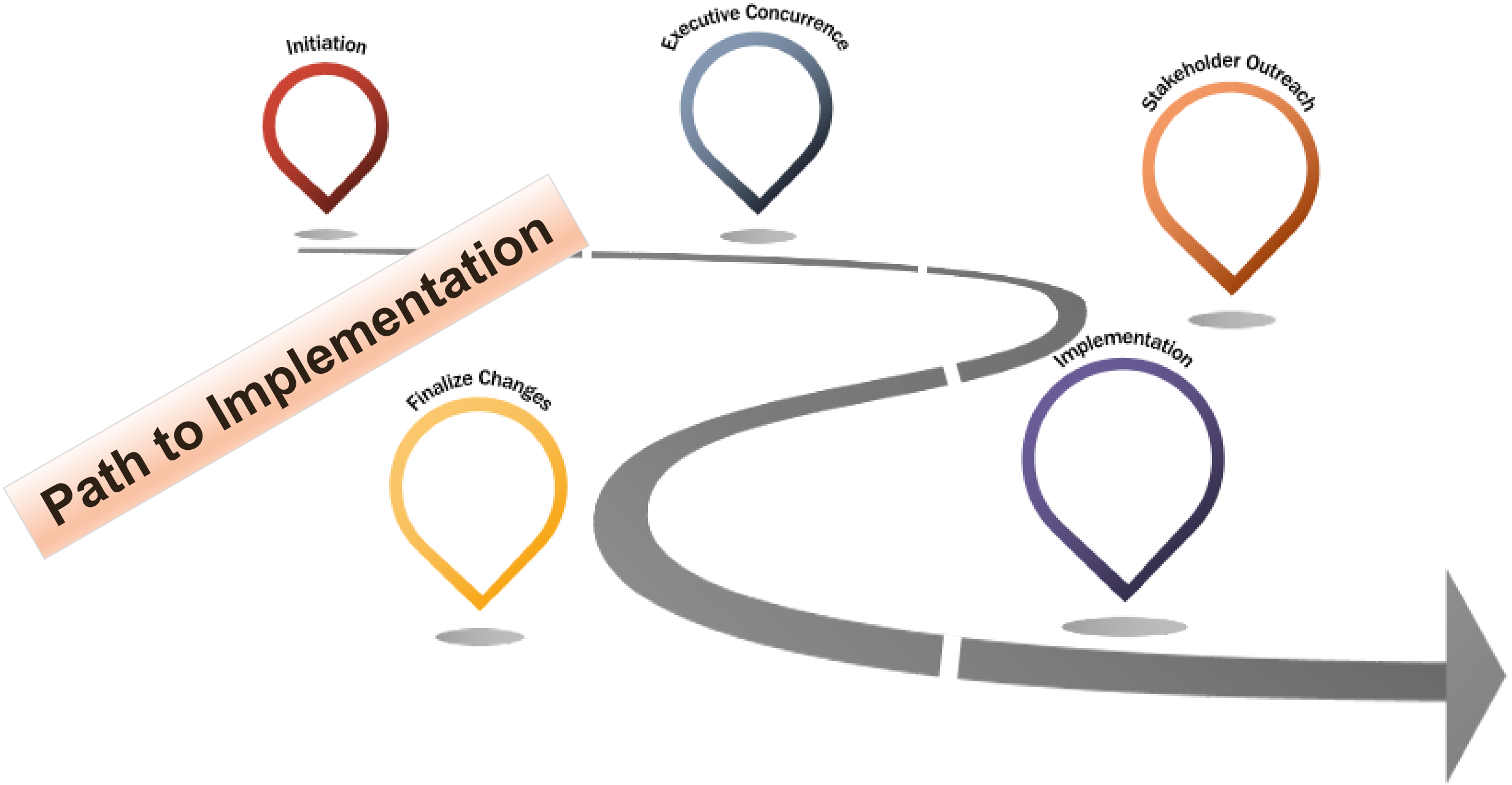
Presentation Agenda

- Overview
- Details
- Change Management
- Tips
- Resources

Questions we will answer…

- WHY did PMO do this?
- HOW did we do approach the revisions?
- WHAT changed?
- WHEN is it effective?
- WHO should care?
- WHERE to go for more information?

Overview

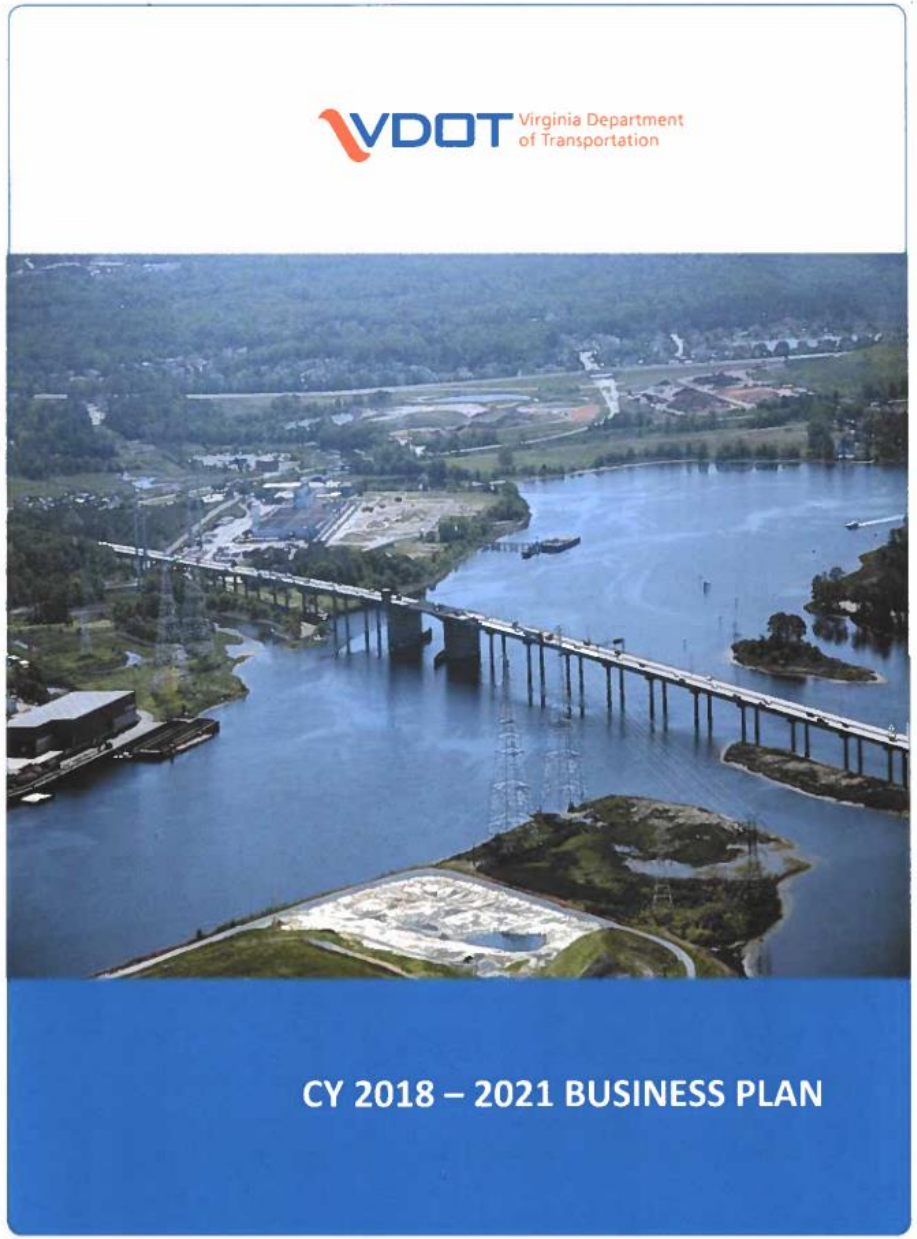

Initiation
Executive Concurrence
Stakeholder Outreach
Path to Implementation
Finalize Changes
Implementation

Initiation

PMO Initiated this effort that was incorporated into Commissioner's Business Plan

Goals

1. Revise PWA templates
2. Clarify policies and procedures
3. Implement changes prior to next SYIP projects entering system (Spring 2020)



Ground-breaking Data Analysis

- Partnered with UVA to conduct unprecedented, comprehensive data analysis
- Considered only UPC's after November 2015 (when existing 54 templates were implemented)
- Thoroughly cleansed data set for 75th percentile calculations
- 4,978 projects, 122,020 tasks

Guiding Principles with Executive Concurrence

1. Balanced driving Project Development with current realities
2. Based task durations on actual historic durations (75th percentile), proofed with Common Sense
3. Extended Local templates to match VDOT

Overarching Goal

Improve accuracy of the SYIP

Extensive Stakeholder Outreach

Many months long effort where PMO worked with…

- Local Assistance Division
- Local Assistance Division Working Group
- Local Assistance Division Locality Stakeholder Group
- Other VDOT Divisions
- VDOT Communities of Practice
- VDOT Program Investment Managers (PIMs)
- VDOT District Project Development Engineers (DPDEs)

Final Changes

During Stakeholder Outreach, our goals were to…

Allowed us to further refine PWA templates to meet established goals

Implementation

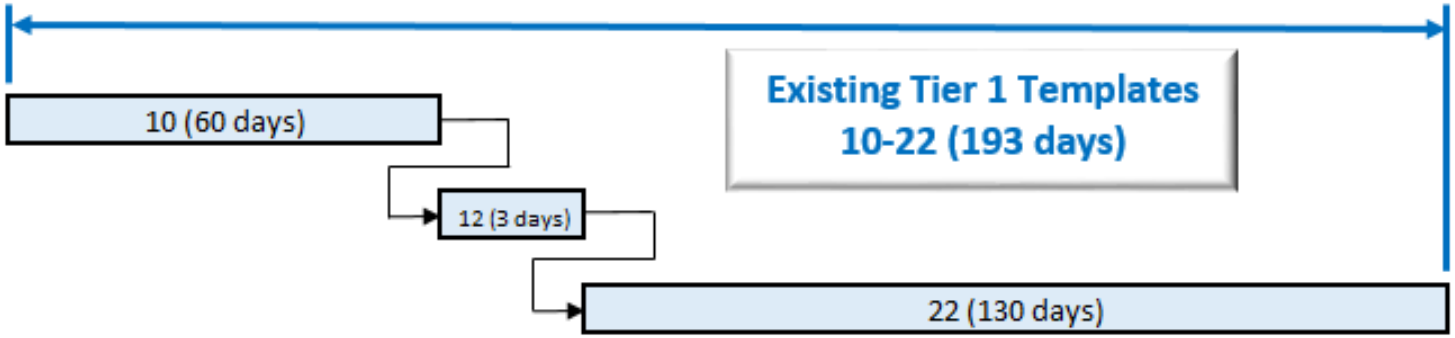
March 13, 2020

Details

What is PWA (Project Web Application)?

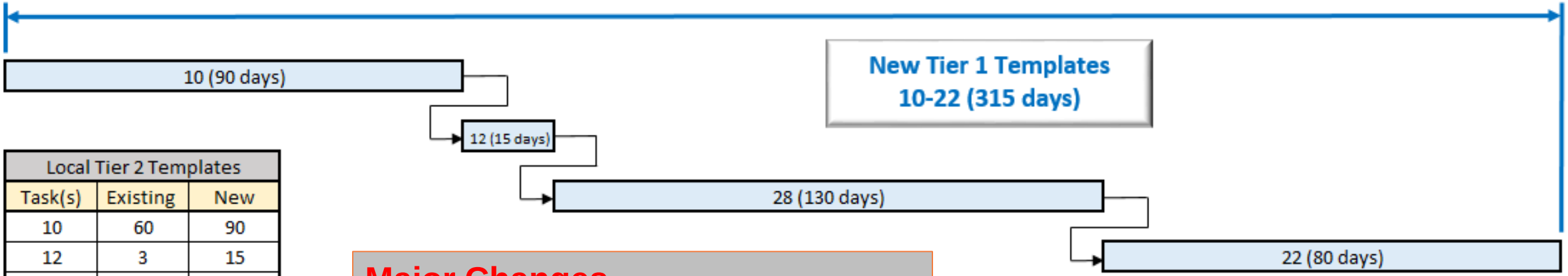
- Server based, enterprise wide scheduling application
- MS Project schedules – dynamic and logic based
- All VDOT and Locally administered projects have a PWA schedule
- PWA is the source of all project dates in all VDOT systems
- PWA dates drive the SYIP
- PWA schedule is **THE** project schedule
- All projects use an project template

LAP Templates
Initial Baseline (1) Details



Task Key

Task 10 = Project Agreement
Task 12 = PE Authorization
Task 28 = Consultant Procurement
Task 22 = Scoping



Local Tier 2 Templates		
Task(s)	Existing	New
10	60	90
12	3	15
28	0	130
22	250	170
10-22	313	405

Major Changes

1. Added more time
2. Added Consultant Procurement

Note all durations in working days

Extended Local Templates to match VDOT time spans

Task Spans	Tier 1				Tier 2			
	VDOT		Local		VDOT		Local	
	Existing	New	Existing	New	Existing	New	Existing	New
Scoping Phase - Local Projects Agreement (10) to Scoping (22)	n/a	n/a	193	315	n/a	n/a	313	405
Scoping Phase PE Authorization (12) to Scoping (22)	237	225	133	225	293	315	253	315
Total Project Development PE Authorization (12 End) to Award (84 End)	1070	843	623	843	1162	1177	806	1177
NOTE: All durations in working days								

Change Management

Project Manager's and Project Coordinator's main job is to control this triple constraint

Threats to Budget, Scope, and Schedule

- Political indecision
- Changing priorities, objectives, and success criteria
- Inexperience / lack of knowledge and skills
- Bureaucratic inertia
- Staff turnover
- Stakeholder involvement
- Unanticipated and/or Unaccounted Risks

Risk Response Strategies

Acceptable Options

1. Escalate
2. Avoid
3. Transfer
4. Mitigate
5. Accept

New Guidance PMO-22.0

Read this

Project Management Procedure

SUBJECT: CHANGE MANAGEMENT (SCOPE, SCHEDULE, AND BUDGET)	NUMBER: PMO-22.0
RESPONSIBILITY: PROJECT MANAGER/PROJECT COORDINATOR	EFFECTIVE DATE: April 7, 2020
	SUPERSEDES: n/a
STATE LOCATION AND DESIGN ENGINEER APPROVAL	Susan H Keen 2020.04.07 14:49:09-04'00' State Location and Design Engineer

The budget, scope, and schedule of any project are inherently interdependent. Before changing any one of these three project components, impacts to the other two should be carefully considered. This document outlines Change Management procedures for when a project's budget, scope, or schedule adjusts. Dashboard business rules describe how it measures the status of active projects to evaluate performance.

GENERAL INFORMATION

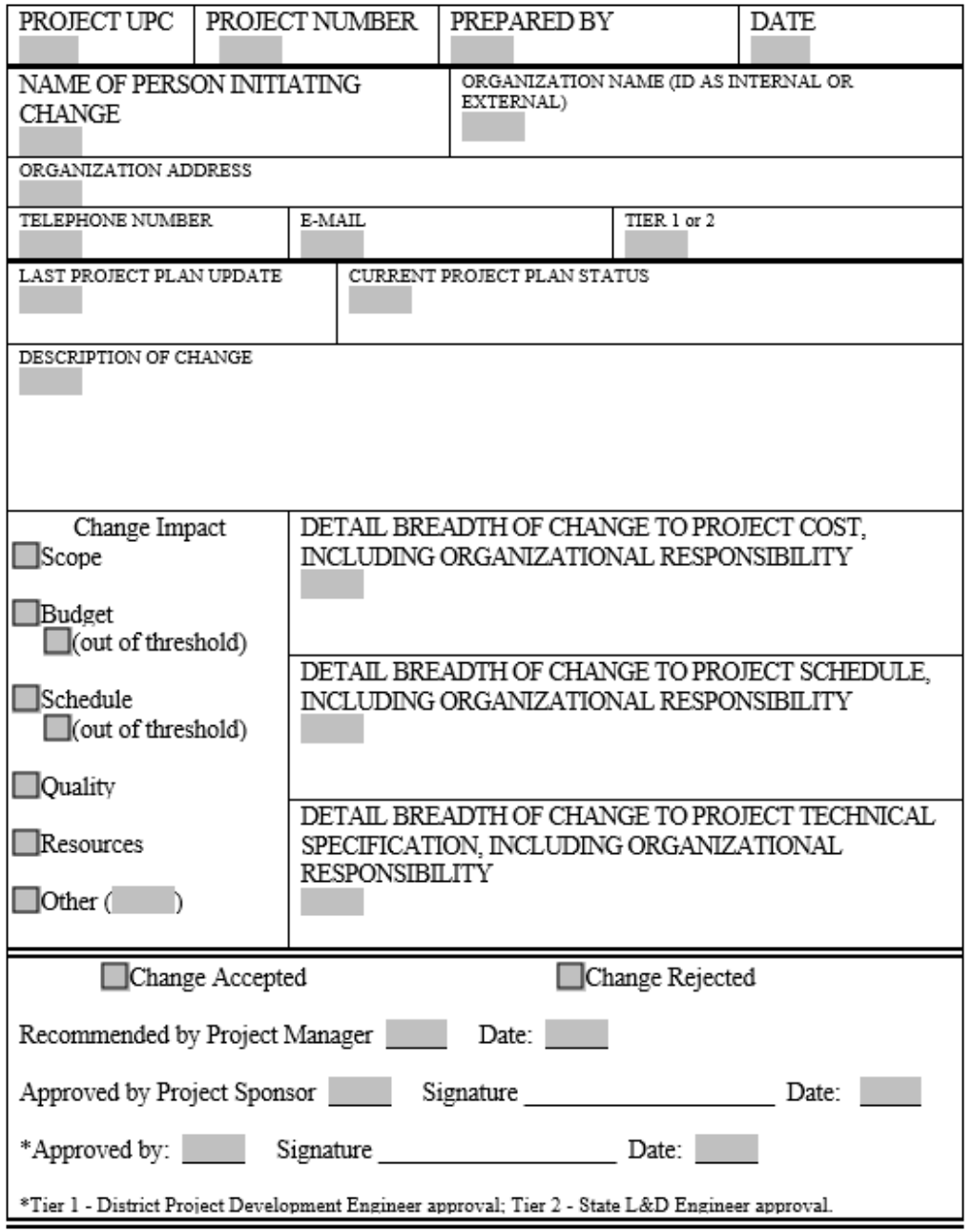
Scope

Scoping is a process that defines the project's purpose and need, along with the proposed solution. Additionally, project specific risks should be qualitatively evaluated and then quantitatively reflected in a revised schedule and estimate that become the Schedule and Budget Baselines to which project performance

VDOT PM-102
Change Control Form

Use this form!

It protects everyone, especially PM and PC



PROJECT UPC	PROJECT NUMBER	PREPARED BY	DATE

NAME OF PERSON INITIATING CHANGE	ORGANIZATION NAME (ID AS INTERNAL OR EXTERNAL)

ORGANIZATION ADDRESS

TELEPHONE NUMBER	E-MAIL	TIER 1 or 2

LAST PROJECT PLAN UPDATE	CURRENT PROJECT PLAN STATUS

DESCRIPTION OF CHANGE

Change Impact	DETAIL BREADTH OF CHANGE TO PROJECT COST, INCLUDING ORGANIZATIONAL RESPONSIBILITY
☐ Scope ☐ Budget ☐ (out of threshold) ☐ Schedule ☐ (out of threshold) ☐ Quality ☐ Resources ☐ Other ( )	DETAIL BREADTH OF CHANGE TO PROJECT SCHEDULE, INCLUDING ORGANIZATIONAL RESPONSIBILITY DETAIL BREADTH OF CHANGE TO PROJECT TECHNICAL SPECIFICATION, INCLUDING ORGANIZATIONAL RESPONSIBILITY

☐ Change Accepted ☐ Change Rejected

Recommended by Project Manager _____ Date: _____

Approved by Project Sponsor _____ Signature _____ Date: _____

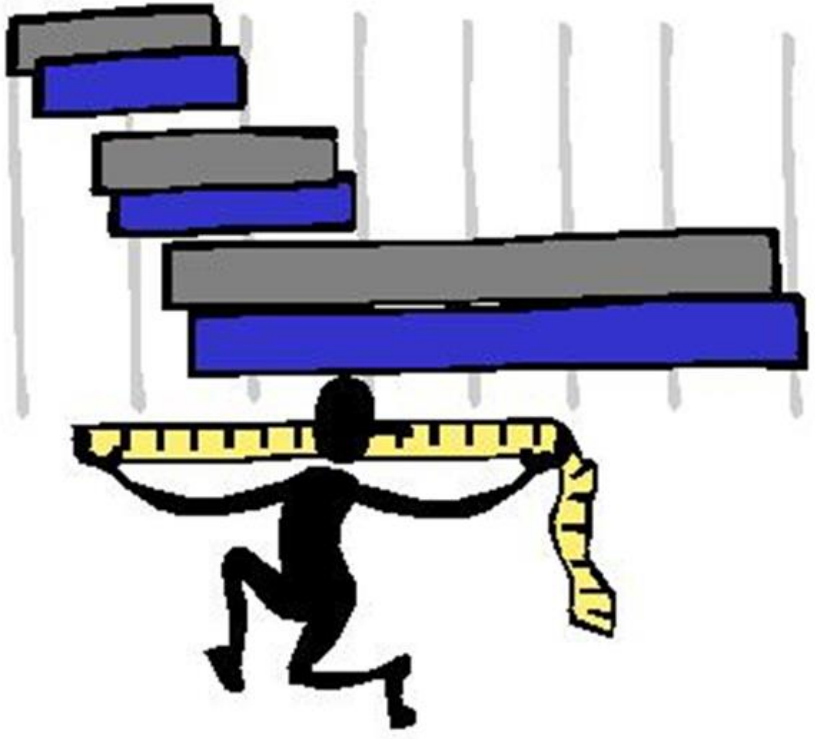
*Approved by: _____ Signature _____ Date: _____

*Tier 1 - District Project Development Engineer approval; Tier 2 - State L&D Engineer approval.

7 Things to know about Dashboard

1. Local Projects are on it
2. Dashboard metrics matters
3. PWA is where Schedules live
4. PWA is THE Project Schedule
5. PCES is where Estimates live
6. Baselines – Scoping
7. Which Tasks are Tracked

What are Project Baselines?



A baseline is a snapshot of the schedule that is frozen at specific time or event.

Actual dates are compared to baselines to evaluate performance as the project progresses.

Important PWA Baselines

Initial Baseline (a.k.a. Baseline 1)

- Captured at project initiation
- Is the Template schedule

Scoping Baseline (a.k.a. Baseline 2)

- Captured at close of Scoping
- Estimate and downstream Schedule should be adjusted (prior to close of Scoping) to account for project specific challenges or opportunities

Which Tasks are Tracked on Dashboard

Reference
VDOT PMO Task and Scheduling Guide

PWA Task Number – Description

Initial Baseline (1)

- 10 - Project Agreement
- 12 - Authorize PE
- 22 - Project Scoping

Scoping Baseline (2)

- 47 - Approve Willingness
- 49 - Adopt Location/Design
- 52 - Authorize RW and UT Funds
- 69 - Acquire RW
- 70 - Obtain Environmental Permits
- 67U - Utility Relocation by Others
- 80 - Advertise Project
- 84 - Award Contract

Dashboard Tasks on Local Templates

Task Number	Task Description	In Local Templates
10	Project Agreement	Yes
12	Authorize PE	Yes
22	Project Scoping	Yes
47	Approve Willingness	No
49	Adopt Location/Design	No
52	Authorize RW	Yes
69	Obtain RW	Yes
70	Obtain Env Permits	Yes
67U	Utility Relocation by others	No
80	Advertise Project	Yes
84	Award Contract	Yes

VDOT Districts can add additional tasks into a project, if desired

How can you change a project's baselines?

- Criteria and Procedures detailed in PMO-22.0 Change Management Procedure
- Work closely with VDOT staff to evaluate your situation
- All rebaseline requests need to be submitted by VDOT District Project Development Engineer (DPDE) to PMO Director

Tips

- **Cooperative partnership between Localities and VDOT Project Coordinator is essential to project success**
- **PM / PC job is to run project within PM Iron Triangle (Budget, Scope, and Schedule)…you can't do this if you don't actively practice appropriate Change Management**
- **Identify and promptly address project risks**
- **Utilize PM-102 (or local equivalent) to document and control Change Management**

The Importance of Scoping (Task 22)

- Ensure project is properly scoped
- Approved PM-100 (or Local Scoping Report) basis for Change Management
- Closing Scoping (Task 22) sets Schedule and Estimate baselines that remain through Award
  - Make sure Project Schedule is as desired
  - Make sure Project Estimate is uploaded and recommended into PCES – System within fourteen (14) days

Resources

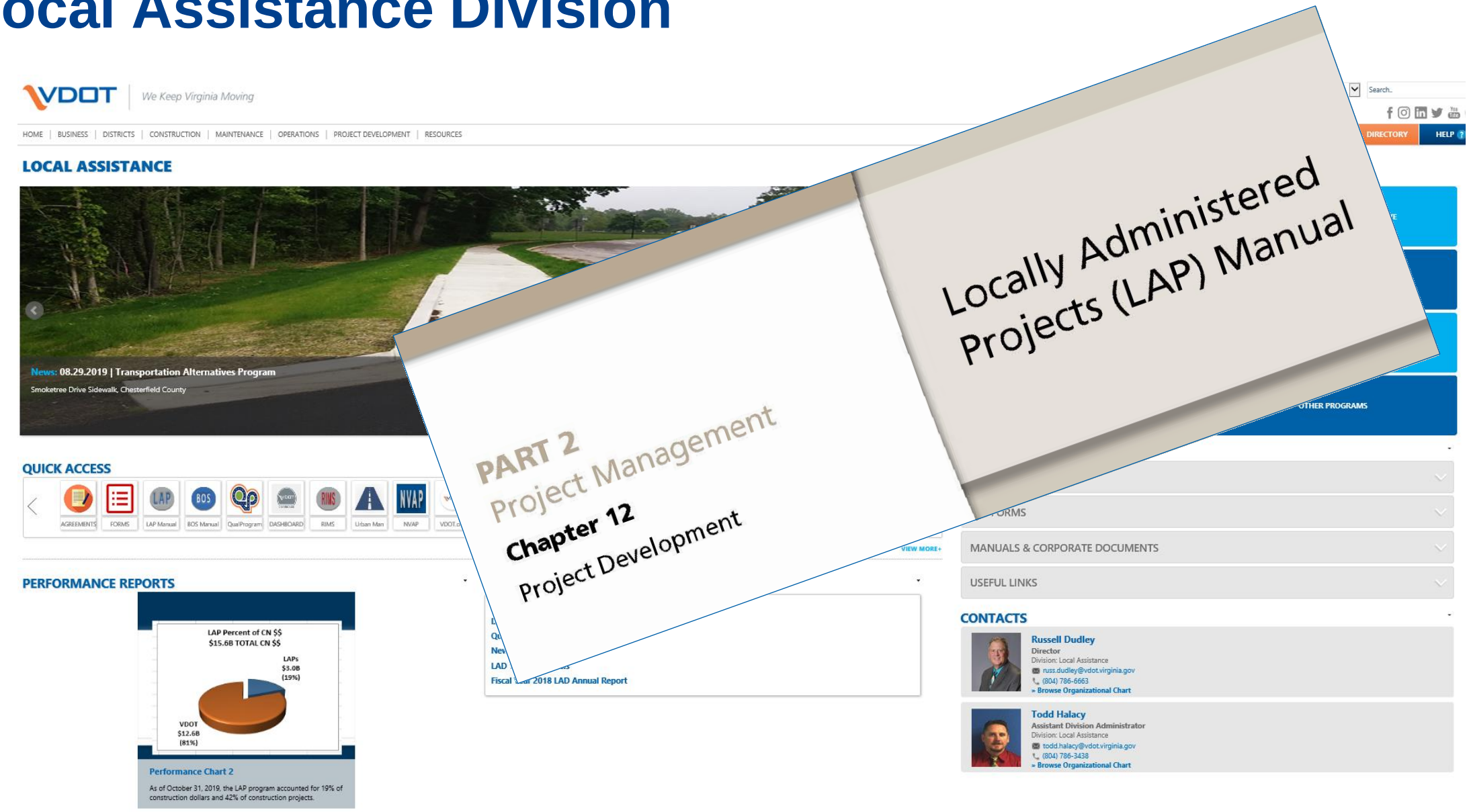
Resources

VDOT Staff

District Resources

- Project Coordinators – critical relationship for Localities
- Project Managers
- PWA District Schedulers
- Programming Investment Manager (PIM)
- District Project Development Engineer (DPDE)

Local Assistance Division



Project Management Office – webpage

Project Management Office

The Project Management Office is responsible for providing technical project management and engineering support to project managers for preliminary engineering projects in VDOT's Six Year Improvement Program (SYIP). We focus on people, processes and tools, defining and maintaining best management practices through policies and procedures, tools and techniques, and relevant project management training.

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Information You Can Use

- Electronic Plan Submission Process Flow Chart
- PMO Forms
- PMO Instructional and Informational Memoranda
- Project Development Process
- Project Development Schedule Templates
- Project Management Institute
- Project Management Policy Links
- Project Tasks and Scheduling Guide

Info Center

Home > Info > VDOT's Extranet Forms Database

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HIGHWAY SAFETY

VDOT Online Forms

Perform a new search

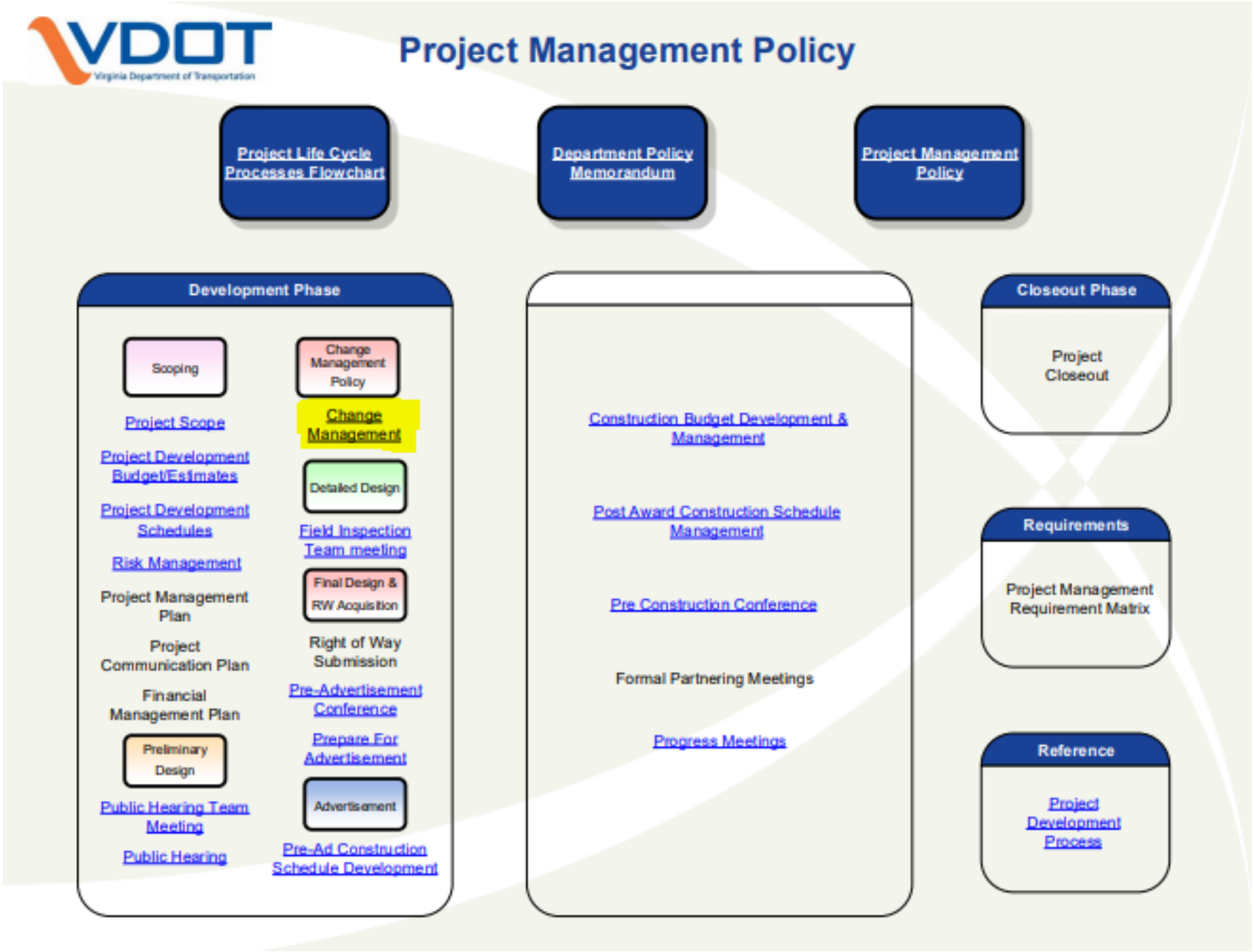
Click the name of any document listed below to open that document

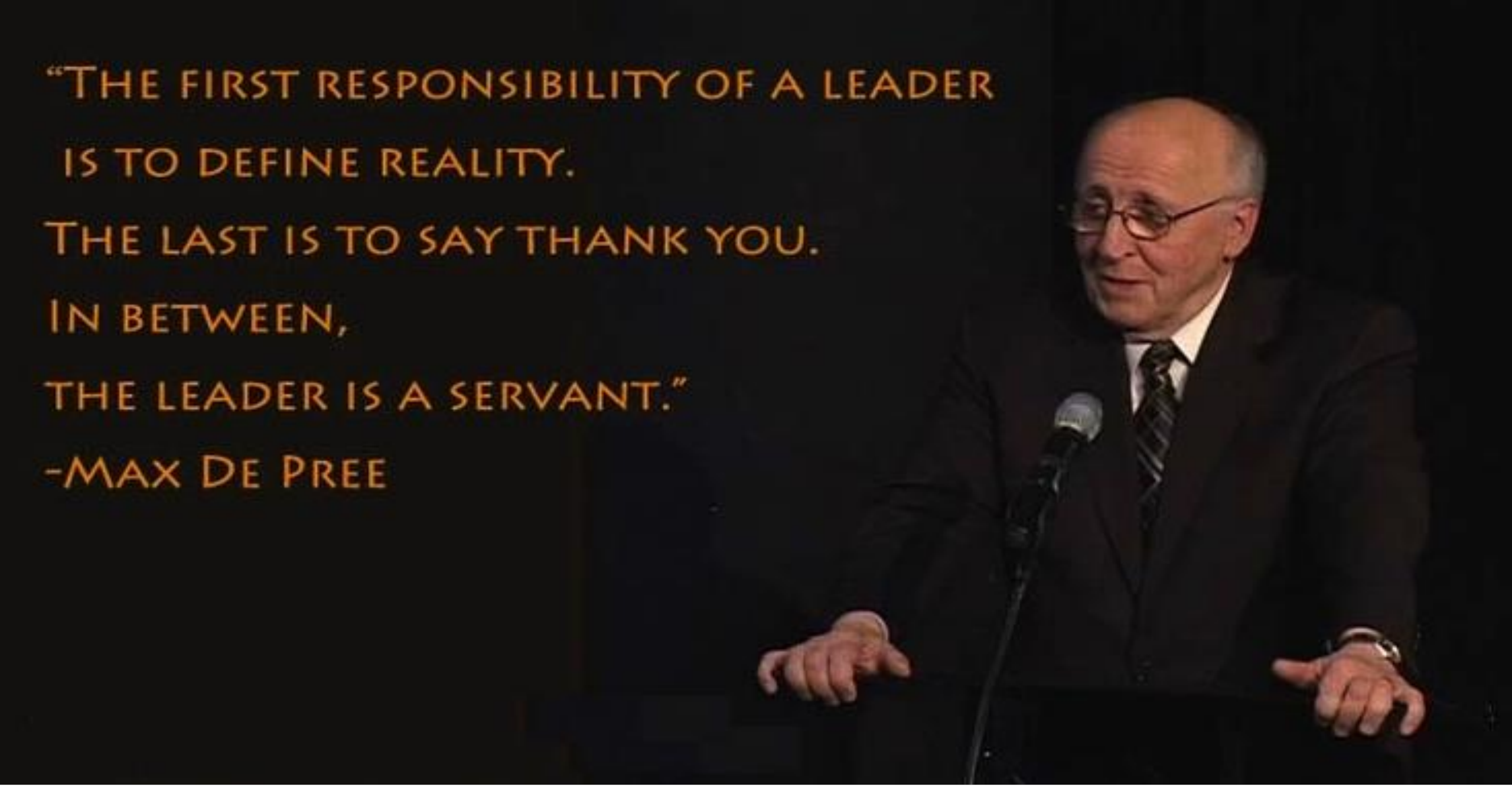
1.) **Automated PM Forms**
Information for accessing PM-104, PM-105, PM-120, PM-130, PM-131 & PM-150 in iPM.
(321927 bytes)

2.) PM-100 **Scoping Report**
Rev. 10/24/19 Documentation of Project Scope
(64817 bytes)

3.) PM-102 **Project Change Control**
Rev. 10/24/19 Used to document changes to Scope, Cost, and Schedule after the project had been scoped.
(58202 bytes)

PMO Website “Project Management Policy” link




"THE FIRST RESPONSIBILITY OF A LEADER
IS TO DEFINE REALITY.
THE LAST IS TO SAY THANK YOU.
IN BETWEEN,
THE LEADER IS A SERVANT."
-MAX DE PREE

Thank
you