

## Comparison of QBR performance measure of PS&E Acceptance and OPL's informal metrics.

Discussion of purposes and methods for data collection can be found on OPL's website located at [http://www.oregon.gov/ODOT/HWY/OPL/pse\\_measures.shtml](http://www.oregon.gov/ODOT/HWY/OPL/pse_measures.shtml)

	<b>QBR Measure</b>	<b>OPL informal metric</b>
Purpose	Organizational measures and health	Feedback for process improvement if the Region so chooses
What is being measured	<p>Delivery organization's performance of PS&amp;E Acceptance vs 13-month lock.</p> <p>Target (forecasted) PS&amp;E Acceptance date is frozen 13 months in advance of this date.</p> <p>Specific data compared is Actual PS&amp;E Acceptance to Target PS&amp;E Acceptance</p> <p>ie – do we know a little over a year in advance, within a 90 day window, what our program will be delivering</p> <p>Target = 80%</p>	<p>Specific ability to meet process timelines and needs for PS&amp;E and Bid Opening dates.</p> <ol style="list-style-type: none"> <li>1) Are we delivering on time to OPL</li> <li>2) Is the package complete when it gets to OPL</li> <li>3) What are we missing if it isn't complete</li> </ol> <p>No dates forecast dates are frozen. As a project changes the requested bid opening, the OPL due date will change with it.</p> <p>Specific data compared are Actual PS&amp;E Submission to OPL Due Date, and Actual PS&amp;E Submission to Actual PS&amp;E Acceptance</p> <p>ie – are we delivering on time complete PS&amp;E packages to OPL to allow for desired bidding timeframes.</p> <p>No target is currently set for these metrics</p>
Inclusion of local projects	No	<p>Yes</p> <p>The Region's are responsible for certifying that local projects are complete, and the work in our office is the same regardless of if it is local or not. Providing you the information can allow you to decide to do something with it, or delete it, your choice, but it shows you how all projects are performing when they arrive in our office. The "raw data" tab in the worksheet has our guess at which projects were local vs. others so you can also look at the data and do with it as you wish.</p>

	<b>QBR Measure</b>	<b>OPL informal metric</b>
Definition of "Late"	The QBR gives a "grace period" of 90 days late for the 13 month lock-in period, which is appropriate for a broader program measure. There is no penalty for being early by any amount.	The informal metrics do not lock in, however they do count late if the PS&E date is on the 1st but the package doesn't arrive until the 2nd, as the package is late to be delivered on the agreed to PS&E due date.  Metrics are also reported in the number of days late and early
Which projects are included in the quarter definitions	The QBR includes projects by their <b>actual</b> PS&E acceptance date.  Example: a project with a locked-in PS&E acceptance date (ie Target PS&E Acceptance) of March 15 <sup>th</sup> and an actual PS&E acceptance date of April 5 <sup>th</sup> is counted in the April-June quarter. This method is consistent with other QBR measures.	The informal metrics includes projects based on their OPL PS&E Due Date.  Example: a project with a locked-in PS&E acceptance date (ie Target PS&E Acceptance) of March 15 <sup>th</sup> , an OPL PS&E due date of March 31 <sup>st</sup> , and an actual PS&E acceptance date of April 5 <sup>th</sup> is counted in the Jan-March quarter.  If this discrepancy with the QBR is troublesome for delivery organizations the informal metrics can be revised to be consistent with the QBR. This discrepancy is expected to cause very infrequent differences (given the usual closeness of the actual ps&e date and OPL due date). In addition, the listing and dates of projects are always included with the informal metrics for discounting by the Region if desired.

	<b>QBR Measure</b>	<b>OPL informal metric</b>
Who collects the data	<p>OPL collects the data as a part of the bid scheduling information. PLs receive a notification their project appears ready to lock in and have a month to confirm or move their project.</p> <p>HPO prepares and issues the measures by linking to the OPL database.</p> <p>The definition of PS&amp;E acceptance has changed. It began as a straight calculation of “locked-bid date – 45 days” to get the locked PS&amp;E acceptance. This definition doesn’t reflect large projects with longer advertisement periods or FFO. During the transition to collecting actual PS&amp;E Acceptance lockin dates (vs bid dates), OPL has adjusted the PS&amp;E acceptance lock in dates for all projects that already had a locked in Bid Date – by using the OPL due date for that locked bid date, given the specifics of the project. This results in using better data as a comparison and better results for the projects. All projects that had not yet locked in bid dates switched to lock in PS&amp;E acceptance dates that were confirmed by the PL.</p> <p>As a result of the transition from a calculation of a Lockin to a confirmed date from project leaders, the QBR will continue to reflect both forms of data (math calculation and confirmed PL dates) for approx a year as the data runs turns over.</p> <p>John Turner is the contact for this data</p>	<p>OPL collects the data as a part of the bid scheduling process and tracks the dates in the OPL database.</p> <p>OPL prepares and issues the informal metrics.</p> <p>Eryca McCartin is the contact for this data.</p>