



PROJECT DELIVERY LEADERSHIP TEAM OPERATIONAL NOTICE

NUMBER PD-19	REVISION # NEW	SUPERSEDES	EFFECTIVE DATE 09-26-2016	VALIDATION DATE	RESCINDED DATE
SUBJECT Project Scheduling/Statewide Reporting			TOPIC/PROGRAM Project Management Business Practices		

PURPOSE:

To set expectations for the business lines regarding project scheduling during the project development/design phase of project delivery, and identify key roles and responsibilities.

BACKGROUND/RATIONALE:

A scheduling and reporting tool is essential to the health of the project delivery organization. Accurate, timely schedule data is required to inform project delivery decision-making at local, regional and statewide levels.

Project scheduling is needed for effective management and communications within the project team. It also establishes a baseline for project status, monitoring, reporting and control.

This document is intended to provide the Project Delivery business line with direction and expectations concerning project scheduling and reporting within ODOT. What follows should be interpreted as the minimum standard for all STIP projects.

SCOPE:

Any ODOT administered STIP project, including in-house and outsourced and all certified local agency projects (does not include state funded local projects.)

DIRECTION/EXPECTATIONS:

ODOT uses a corporate Microsoft Project Scheduling System (formally known as RMS), which is the required scheduling tool to track at a minimum, the Statewide Milestones. Utilizing the corporate system for all project activities is also recommended as a Project Management best practice. All applicable staff and managers are expected to use the corporate system in a timely and effective manner, according to the standards outlined here in PD-19.

Regions are expected to develop a process/procedure and an MS Project template that includes the corporate milestones and any other tasks needed to ensure all resource units are aware of schedule changes that affect their work and that effectively communicate with technical disciplines.

SCHEDULE MANAGEMENT EXPECTATIONS

- ***Statewide (Corporate) Milestones***

Regions are expected to develop and maintain region-based schedule templates. These templates must include, at a minimum, the following approved, standard statewide (corporate) milestones.

Milestone	Activity Number
Project Delivery Team Kickoff Meeting	018
Design Acceptance Phase Complete	325
Advanced Plans Phase Complete	472
PS&E Submittal	551
Bid Opening	560

([See PD19 Milestone definitions for more information](#))

- ***Schedule Updating and Publishing***

Project schedules shall be initiated, developed and published to the server in accordance to each region's scheduling process no later than the Project Delivery Kickoff Meeting. Regions are expected to actively maintain and manage project schedules through the duration of the project. Project schedules shall be published to the server after each revision that affects the project's critical path or that requires resource units to adjust their work effort.

- ***Project Baselineing***

It is a recommended project management practice that once the project schedule is complete and accepted by the stakeholders, the schedule is baselined. For MS Project, to baseline the schedule is simply a matter of a two-step process: simply select the tasks that will be baselined and "OK" the selection for baselining. The value of baselining each project schedule is that it allows project managers the ability to monitor and manage current project performance and also improve the accuracy of future estimates, such as task durations.

While not a requirement of this Notice, all users of MS Project are encouraged to increase their knowledge and skills in project management, which includes project baselineing. Doing so will help better manage the triple constraints of project scope, schedule, and budget, which aligns with PDLT's goals of increasing efficiency and effectiveness of project delivery.

- ***How often should project schedules be updated?***

Regions are expected to actively maintain and manage project schedules. This includes reviewing, updating, and re-publishing (when required) detailed project schedules.

- ***Reporting***

PDLT may request from Strategic Business Services quarterly reports that monitor the implementation of this notice, which may include the percentage of projects with MS Project schedules and the degree to which all milestones are being used in project schedules. To the extent these measures remain useful, this information may be included in the Highway Management Team Quarterly Business Report. Other project management measures, where useful for helping to achieve PDLT goals, may also be reviewed at PDLT.

ROLES & RESPONSIBILITIES:

Region System Experts

- Provide expert system advice, counsel and technical support to the region.
- Maintain region template(s).
- Work with system manager and system administrator and other partners/regions to identify improvements and resolve issues.

Schedule Manager – agency project manager responsible for leading the project management aspects of project development/design.

- Direct agency schedule management
- Initiate and facilitate a timely process for developing, and publishing schedule.
- Actively manage and maintain the schedule.
- Review and update the schedule with the project team regularly.
- Identify and resolve duration conflicts with resource managers.
- Oversight role
- Obtain project schedule from other agency or consultant.
- Create a MS Project schedule that at minimum includes the statewide (corporate) milestones.
- Actively manage and maintain the schedule when changes are received from other agency or consultant.

Resource Managers

- Identify and resolve resource conflicts with schedule manager.
- Assist in schedule development and management.

Area Managers

- Manage the change management process.
- Participate in outsourcing decisions.
- Manage the project delivery program in their area.

Tech Center Managers

- Forecast generic resource needs.
- Participate in outsourcing decisions.
- Ensure that technical aspects of project development in the region are delivered on- time.

System Administrator (Strategic Business Services)

- Provide customer service/support for scheduling management system users.
- Lead system application development and maintenance processes.
- Maintain and update system data tables and network functions.
- Manage day-to-day operations of the MS Project system and resolve issues.
- Develop and prepare reports as requested by Regions or Managers.

System Manager (Strategic Business Services)

- Reporting role (as noted in Reporting section above)
- Develop and manage major system improvements, software upgrades, and business process changes.

REFERENCES:

- [PD-01](#)
- [PD-02](#)
- [Statewide Milestone definitions](#)
- [Simple Schedule Template \(optional\)](#)