This procedure outlines the actions required to develop and maintain Project Development Schedules. The project manager, with close collaboration and support from Team Members, is responsible for the development and management of the Project Development Schedule throughout the entire project life cycle. Creating and maintaining accurate Project Development Schedules are critical to the timely delivery of the Six-Year Improvement Program, Federal Strategy, and the Commonwealth Transportation Board’s priorities.

GENERAL

Project Development Schedules
Project Development Schedules serve as the foundation for Programming Schedules. Project Development Schedules are generated from data entered in Project Pool where it is used for the selection of an appropriate Microsoft Project template. These templates contain tasks commonly required for the project type. The default task durations are reasonable in order to set realistic dates for key tasks that drive the programming and allocating of funds. The project manager may need to adjust the default Project Development Schedule task durations to suite the unique characteristics of the project. This is accomplished with close collaboration with the project team during the scoping phase. The schedule is finalized and baselined once scoping is formally approved.

Programming Schedules
The Programming Schedule consists of the beginning and ending dates for the Preliminary Engineering, Right of Way (if applicable) and Construction phases. The Project Manager may need to adjust the Project Development Schedule based on funding availability. If the project can be delivered faster than funding is available, the Accelerated Dates feature in Project Pool should be used to communicate the Project Development Schedule.

Monitoring and Updating Project Development Schedules
Development Schedules are accessible through the Schedule module, linked to Project Pool and iPM. The Project Manager and Team Members are responsible for keeping the schedule up-to-date at all times. Entering actual beginning and ending task dates are the responsibility of the entire team. The Project Manager has authority to enter actual dates for any project task, while Team members have authority to enter actual dates for those tasks assigned to them. Some actual dates are uploaded automatically. These dates are entered in other VDOT systems.
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Details

Developing Project Development Schedules
The initial Project Development Schedule is generated during project initiation and data verification from a Microsoft Project template. During scoping the Project Manager is responsible for tailoring the Project Development Schedule to fit the individual project. This is accomplished by:

- Validating each necessary phase (PE, RW and CN) and phase dates.
- Reviewing and adjusting task durations based on task manager and team member feedback and from information in the Project Tasks and Scheduling Guide.
- Reviewing the updated Project Development Schedule with Project Sponsor, Project Development Engineer, Program Investment Manager, Team Members and key stakeholder prior to or at the Preliminary Field Inspection (Final Scoping Meeting).
- Incorporating any final changes and reviewing with the team to ensure everyone is committed to accomplishing the tasks as scheduled.
- Communicating the importance of reporting actual dates in a timely manner.
- Entering the agreed upon Project Development Schedule in the Schedule module.
- Entering the actual ending date for task 22 – Scope Project in the Schedule module after receipt of the approved Scoping Report (PM-100).

If the Project Manager has a copy of Microsoft Project Professional loaded on his/her computer, the templates are available on the PMO website for downloading. The template can then be utilized to make all scoping schedule changes utilizing the schedule logic. While the Microsoft Project schedule may not be uploaded to the Schedule module and requires manual input of dates for any schedule modifications, this method still offers the benefit of utilizing the software logic to calculate the dates and new critical path. Since future iterations of the Schedule tool will utilize MS Project, it will help prepare the Project Manager get familiar with the software. The templates are also offered as PDF files for anyone not possessing MS Project.

Monitoring and Updating Project Development Schedules
The entire project team is responsible for ensuring the Development Schedule is kept up-to-date. The Project Manager should monitor the schedule frequently. Schedule variances should be documented and discussed at team meetings. Likewise, strategies for getting the project back on schedule should be identified and documented if a date is missed. Actual dates should be entered as soon as the task is started or completed. Actual dates are entered in the Schedule module by means of the edit button located on the task bar. The Project Manager must enter Team Members in the Communications & Divisions tab of iPM so they have the necessary privileges to enter actual dates. See the iPM User’s Guide and Schedule User’s Guide for detailed instructions on adding team members and entering actual dates. If revisions to the planned dates are needed, the Project Manager should discuss them with the Sponsor and Team members prior to requesting the revision.

Revision Requests/PD-1
If a schedule revision results in a change in the Advertisement planned date, and the original planned date was within 36-months, the system will automatically generate a PD-1 Estimate/Ad Date change form for PDE and PIM approval. Additionally, if the planned Advertisement date was within 24-months and the change results in a delay to the Advertisement date, the following is required:

- Tier 1 - reviewed and approved by the District Administrator before entering the schedule revision in the systems.
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Project Management Office

- Tier 2 – reviewed and approved by the Chief Engineer before entering the schedule revision in the systems. Submit Tier 2 schedule delay requests through the Central Office Project Management Office.

The Project Manager must enter/revise the estimated construction completion date (schedule task 91 – Administer Contract) when submitting an Advertisement Date Revision Request to ensure the date appears correctly on the automatically generated PD-1. Upon review, the PDE and PIM may approve the pending PD-1 and all revisions will be reflected in Pool, iPM, PCES and will be updated in the Live SYIP.

<table>
<thead>
<tr>
<th>Advertisement Planned Date Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outside 36-month window</td>
</tr>
<tr>
<td>No automatic PD-1</td>
</tr>
<tr>
<td>No approval required</td>
</tr>
<tr>
<td>Tier 2 - Deputy Chief Engineer, PDE &amp; PIM approval required</td>
</tr>
</tbody>
</table>

See Program Management Division PD-1 and PD-24 Guidelines for detailed information regarding this process.

Dashboard Baseline
The VDOT Dashboard provides transparency to certain areas of our work routines and activities, including project management. Up to 31 individual project tasks are monitored in the Projects – Project Development – Engineering area of the VDOT Dashboard. Dashboard provides a green/yellow/red view of projects by analyzing the timeliness of task completion throughout the development process. In order for colors to appear, a project must have a baseline established. The Dashboard Schedule Baseline is triggered when the actual ending date is entered in the Schedule module for schedule task 22 – Scope Project. If the planned date for advertisement is within 24-months, the Baseline is established upon entering the actual ending date for task 22. If, however, the planned date for advertisement is beyond the 24-month window, the schedule baseline does not apply until both conditions is satisfied.

Projects may qualify to be re-baselined after they are locked in Dashboard. There are circumstances that normally warrant re-baselining such as lack of or redistribution of project funds by the Commonwealth Transportation Board (CTB), a documented change of priorities by a local Board of Supervisors, or a major change of scope by the locality. Re-baseline request are submitted to the Deputy Chief Engineer through the Central Office Project Management Office. In order for a re-baseline request to be forwarded to the Deputy Chief Engineer, the following information must be included.
- Reason for re-baseline request
- Documentation in iPM Documents detailing reason for baseline change (i.e. – letter from BOS confirming change in priorities, requesting change in project scope, etc.)
- Spreadsheet with necessary district signatures.

Upon verification of required information, the PMO forwards the request to the Deputy Chief Engineer and if he determines the request meets the Dashboard business rules or the intent of the rules, he notifies the District and the Central Office PMO and the necessary baseline reset is accomplished. See the Dashboard User’s Guide for detailed Dashboard information and business rules. For more information on how to submit a re-baselining request, refer to Changing Baselines on Dashboard and the supporting spreadsheets may be found here: schedule re-baselines and here: estimate re-baselines.

Final Project Development Schedule Review
At project advertisement the Project Manager shall verify all tasks have actual dates recorded as the project enters the Construction phase (exceptions may include certain Right of Way tasks and the Authorize Construction task)
prior to changing the name in the Project Management field in Pool to the individual responsible for project management duties during the Construction or Project Delivery Phase.

TOOLS AND RESOURCES

Project Tasks & Scheduling Guide
Project Development Process
Schedule User’s Guide
iPM User’s Guide
Project Pool User’s Guide
MyiPM
iPM Reports
Dashboard 3.0 User’s Guide
Project Schedule Templates
Cutoff Dates
Local Assistance Division
Microsoft Project Professional software
Project Management Body of Knowledge (PMBOK) - Chapter 6, Project Time Management.
Project Change Control Form (PM-102)
Risk Management Form (PM-103)
VDOT U Schedule Training