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 suit 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. Project Managers are expected to accelerate the development of their projects whenever practical. Early start / early finish capabilities will be utilized for all projects and will be shared with the project team in PWA and reported to management by use of Gantt Charts.

Monitoring and Updating Project Development Schedules
The project UPC number determines how the Development Schedule is accessed. For projects with UPC numbers less than 106632, schedules are accessible through the Schedule module, linked to Project Pool and iPM. For projects with UPC numbers greater than 106632, schedules are accessible in Project Web Application (PWA). 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. In PWA, the Project Manager is responsible for replacing the generic resources (manual actuals) with the names of those responsible for the individual tasks. When this is done, team members are automatically notified that they have been assigned tasks and the dates those tasks are due. Certain actual dates are uploaded automatically (auto actuals). These dates are entered in other VDOT systems (CEDAR, RUMS, and TRANSPORT) and are uploaded to the Schedule module by means of an automated overnight feature. These tasks and are identified in the Project Tasks and Scheduling Guide.

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).

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. For projects with UPC numbers less than 106632, see the iPM User’s Guide and Schedule User’s Guide for detailed instructions on adding team members and entering actual dates. For projects with UPC numbers 106632 and greater, see the Schedule Tool Project Web Application (PWA) Actual Update Quick Reference Guide. If revisions to the planned dates are needed, the Project Manager should discuss them with the Sponsor and Team members prior to making changes to the schedule.

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 steps are required

- Tier 1 - reviewed and approved by the District Administrator before entering the schedule revision in the systems.
- 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 – Administrator
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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><strong>Outside 36-month window</strong></td>
</tr>
<tr>
<td>No automatic PD-1</td>
</tr>
<tr>
<td>No approval required</td>
</tr>
<tr>
<td></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-baselines 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
Schedule Tool Project Web Application (PWA) Actual Update Quick Reference Guide
Initial Project Variance Gantt Chart – PWA View
Scoping Variance Gantt Chart – PWA View