



PROGRAM MANAGEMENT PLANS AT TXDOT

Transportation Programs Division – PPM

Fort Worth District

Bryan District



Outline

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Portfolio: Roll up of programs and projects within the organization.

Program: A cluster of similar projects managed in a coordinated way.

Projects: Temporary endeavor with a defined deliverable that has a beginning and an end.

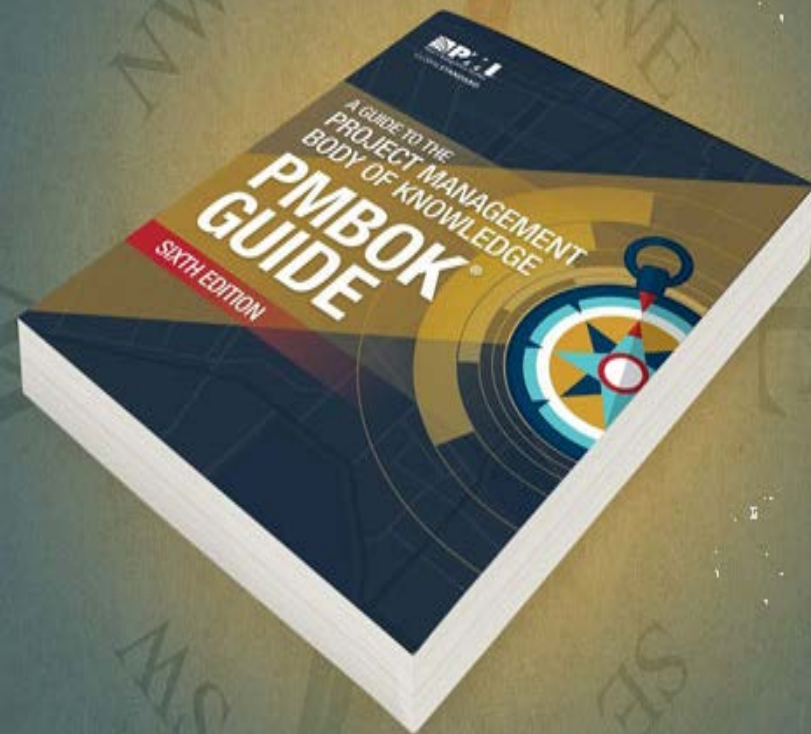
What is a project management plan?

Project management body of knowledge (PMBOK) definition:

“...a formal, approved document used to guide both project execution and project control.”

The primary uses of the project plan are:

- Documentation of planning assumptions and decisions.
- Facilitation of communication among project stakeholders.
- Provision of document-approved scope, cost, and schedule baselines.



What is a project management plan?



- Baseline for scope, cost, and schedule.
- Plans on how to manage scope, cost, schedule, quality, communication, resources and procurement.
- Change management.
- Risk management.
- Process improvement.



Required

- Major projects
- Operationally independent
- Non-concurrent Construction projects

Recommended

- Phasing
- Multiple project sponsors

*“The **purpose** of the project management plan is to clearly **define** the roles and responsibilities of the agency leadership and management team, and to **document** the procedures and processes that are in effect to provide timely information to project decision makers...”*

–FHWA

FHWA Standard Areas

- Identifying project requirements
- Establishing communication protocols
- Scope
- Quality
- Schedule
- Cost
- Resources
- Risks
- Applicable laws and regulations



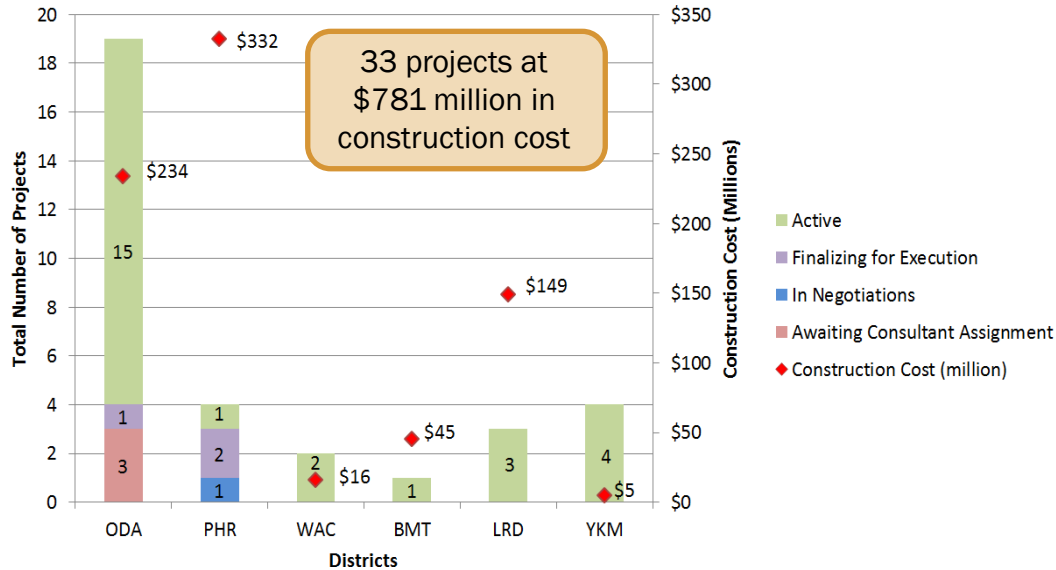
The Project and Portfolio Management (PPM) section of the Transportation Programs Division provides:

- Project management training.
- Project management mentoring.
- Project management guidance.
- Project management tools.
- Scheduling support.



Project and Portfolio Management section

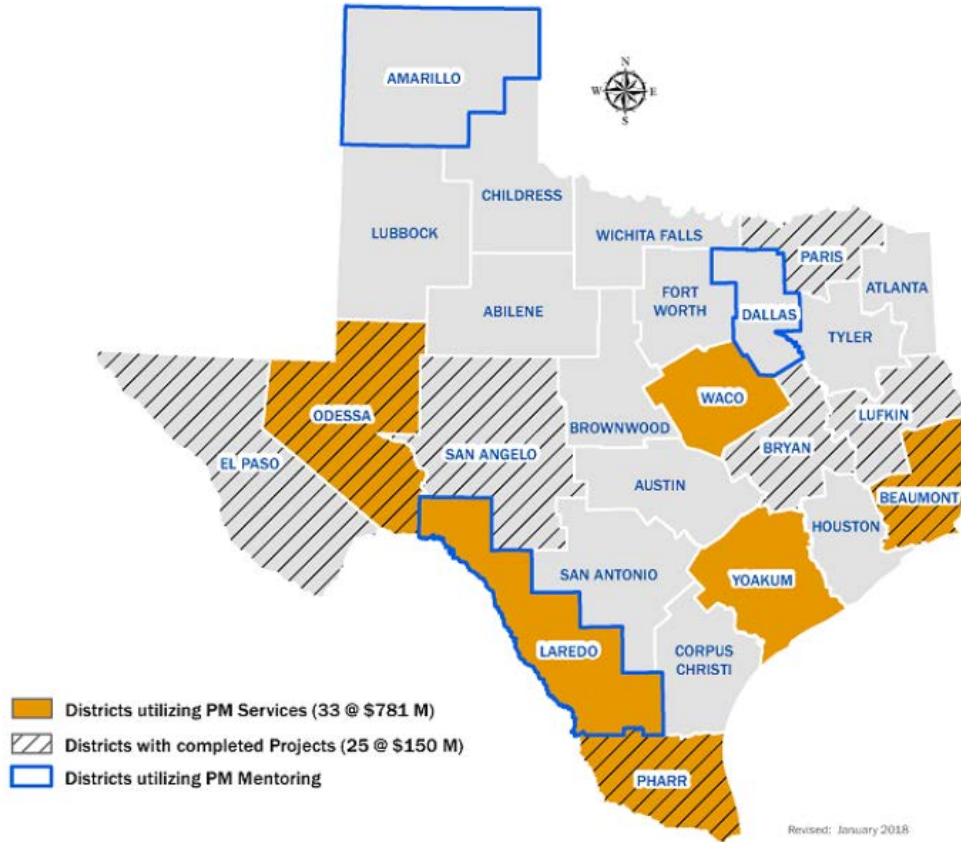
PPM Consultant Project Management Portfolio (Jan 2018)



Project and Portfolio Management:

- Supports district project managers
- Provides demonstration and mentorship to project managers
- Helps identify the appropriate tools and techniques for specific District and projects.
- Supplies project-management resources to the District during peak times.
- Collects feedback to develop and refine tools.

Project and Portfolio Management section



Odessa District



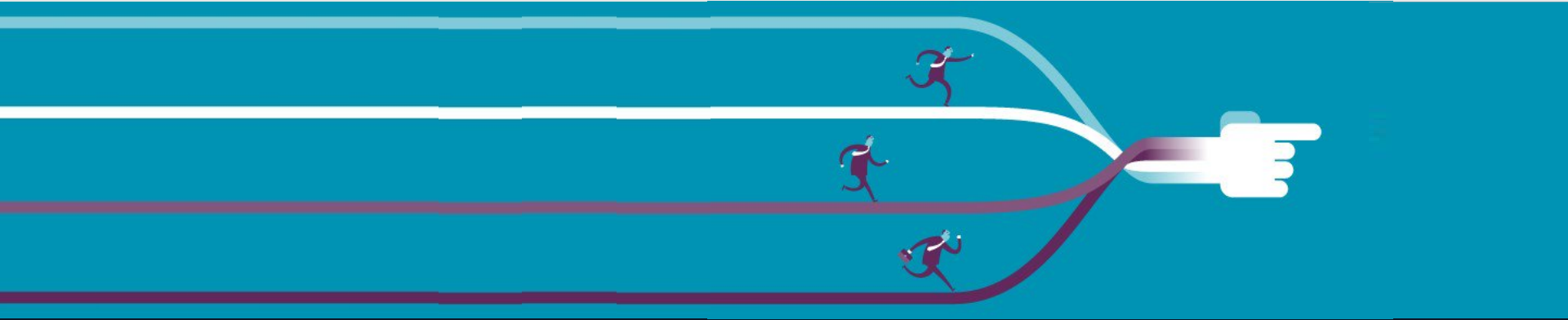
Lessons learned

- Long plans with unnecessary details.
- Redundancy across district projects for standard processes.



What changed?

- Work group created to streamline documents.
- Only includes relevant sections.

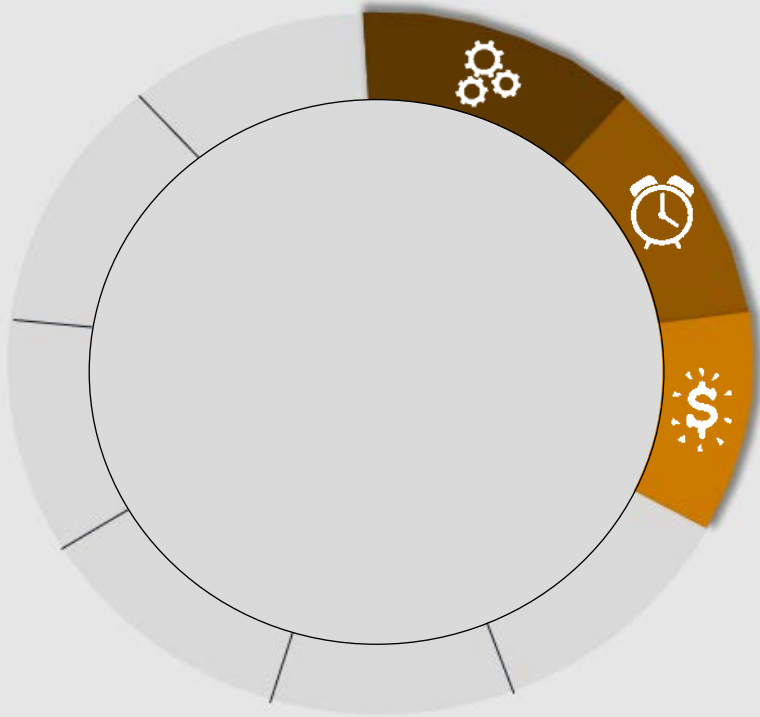


A new template was developed which included:

- Changes according to feedback.
- Standard areas which could be recommended for every plan.



Where are we now?

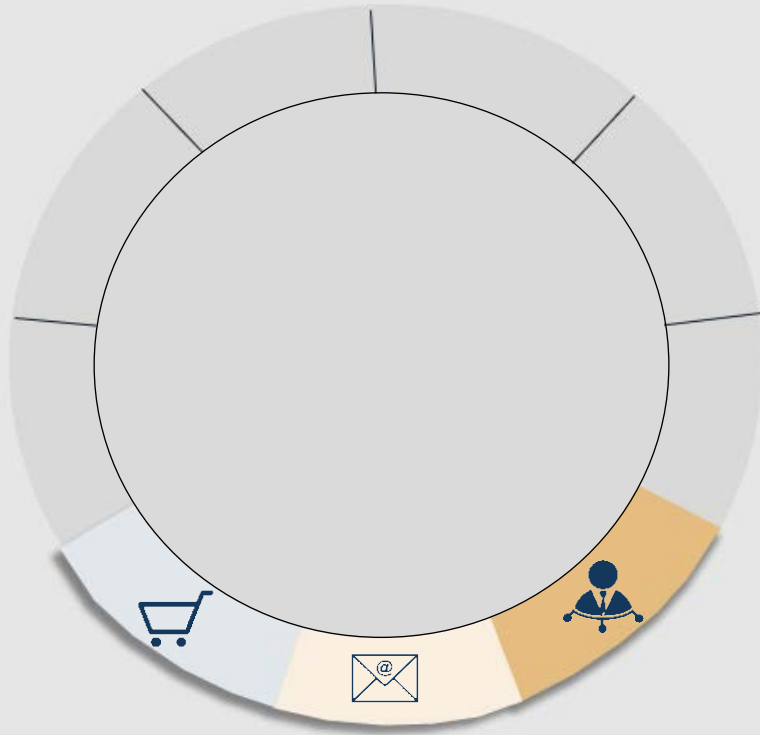


Project change and issue management

Schedule management

Cost management

Where are we now?

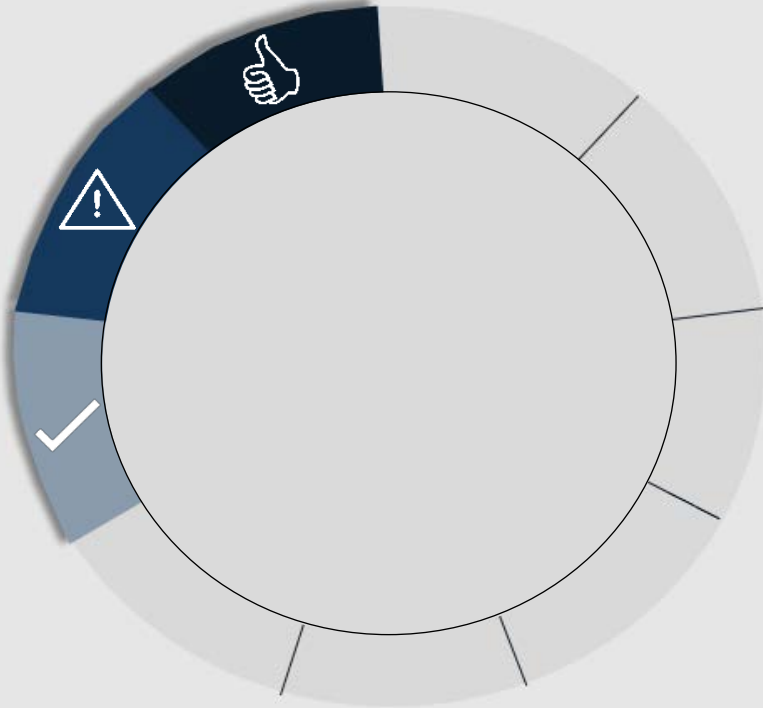


Resource management

Communication management

Procurement management

Where are we now?



Quality management

Risk management

Project closeout

program level vs. project level management plans

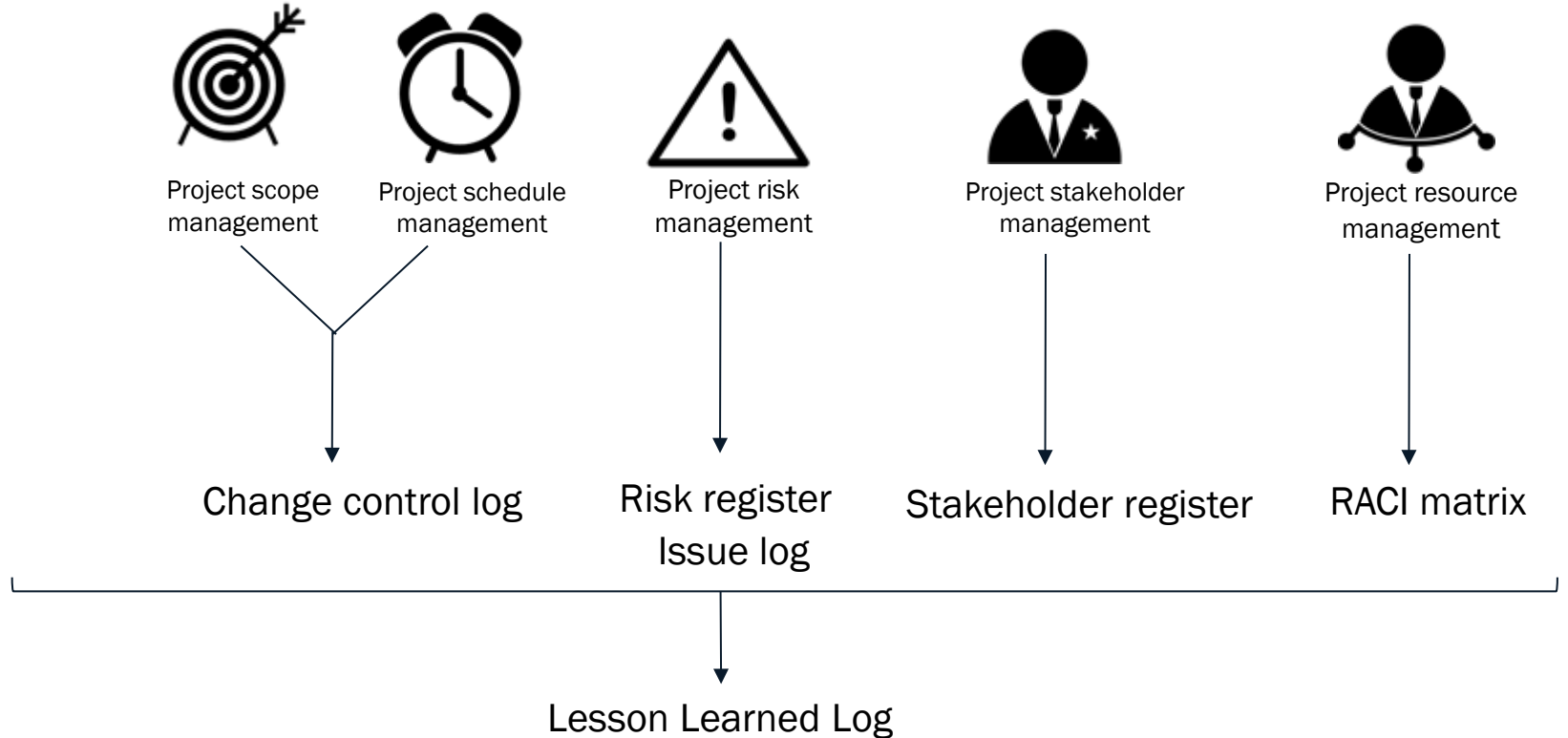
	Program Level	Project Level
Scope	No scope discussed, but the general approach to scope change is covered.	Project specific scope is covered in detail, including constraints, assumptions and requirements.
Schedule	General scheduling requirements are covered including roles, responsibilities and timeframes.	Project specific schedule should be developed and approved. If consultants are involved, then all schedules need to be reconciled.
Cost	General approach to cost management is covered. Outlines PMs responsibilities related to cost management.	Project costs are documented and baselined for tracking through the project life. This may include basis of estimates and funding budgets.
Resources	Generic roles are defined along with their responsibilities on projects.	Specific resources working on the project team are identified. Responsibilities are confirmed.



Project specific plans may be needed for:

- High complexity.
- High risk.
- Or any project that does not follow standard practice.

Project tools



Project management tools

Select a tile below to filter by a Practice Area

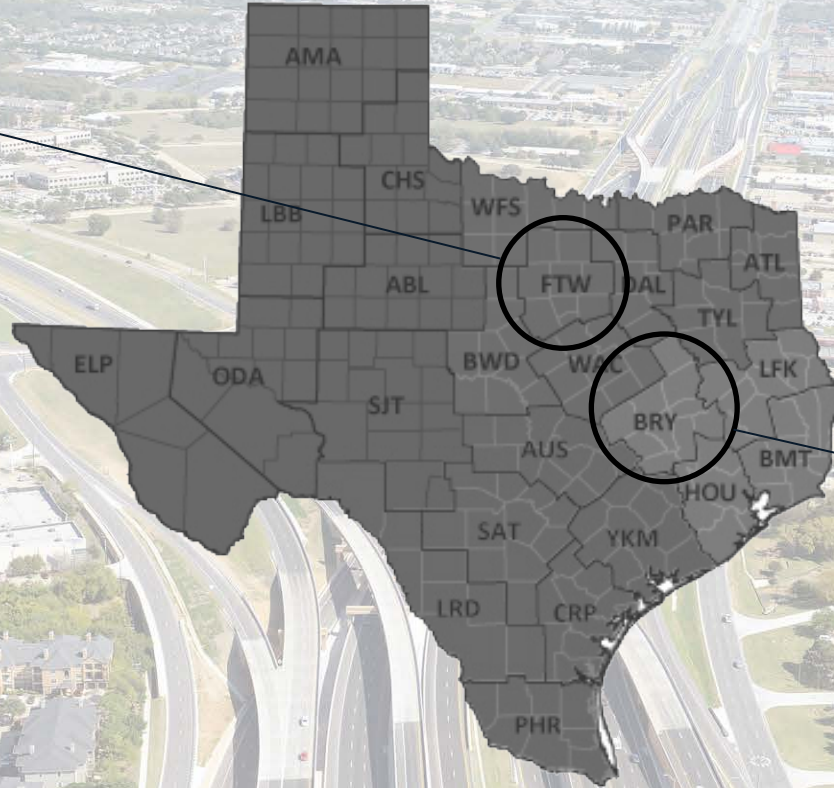


Name	Document Description	Tool Type	Learning Paths	Modified
Action Item Tracking Log	This is a template for the Action Item Tracking Log.	Template	General PM; Transportation PM	December 5, 2017
Change Control Log	Change Control Log	Template	Transportation PM	February 1
Communications Log	Communications Log	Template	Transportation PM	October 31, 2017
Invoice Ledger for Preliminary Engineering	This tool helps project managers track and monitor invoice payments to TxDOT consultants.	Template		January 8
Issue Log	This template is used to document issues identified during the life cycle of a project.	Template		January 31
Kickoff Meeting Checklist	This is a preparation checklist for Kickoff Meetings.	Template	General PM; Transportation PM	December 5, 2017
Meeting Minutes Document	This template is used to document meeting minutes for a project.	Template		April 18
PM Capacity Tool	This tool can be used as a high-level planning tool to assign and estimate project management capacity for transportation projects by evaluating and scoring of individual projects.	Template	Transportation PM	January 10
Program Management Plan	This is a template used to document how projects within a specific team are generally managed.	Template		February 15
Project Closeout Meeting Checklist	This tool is intended to help in preparation for and execution of a project closeout meeting.	Template		November 27, 2017

Districts adapting management plans



Fort Worth



Bryan

Business need

- Knowledge gap.
- Higher production rates.
- Efficiency.
- Document.

Action plan developed



Fort Worth central design collaborative approach:

- Reviewed other districts' management plans.
- Seven-member team of project managers.
- Met regularly.
- Living document – easily modified for specific projects.



Fort Worth central design program plan – Observations

Anticipated benefits:

- Increased communication within the team.
- Documented processes.
- Flexible to fit specific projects.
- Flexible for in-house or externally resourced teams.

Observations

- Sense of pride.
- Sense of proactive management.
- Highlighted some differences in the way project managers were doing things.



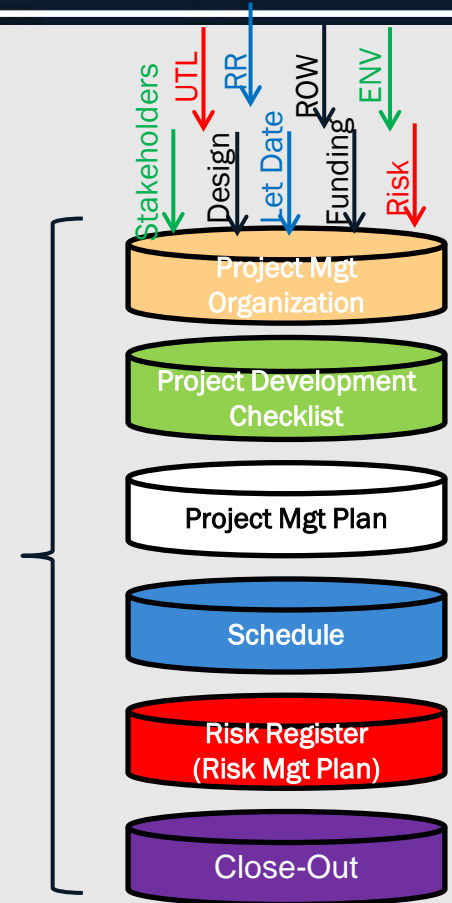
Bryan District plan — Why was a plan or template developed?

- Step 1: Critically looked at our project management approach.
- Fundamental question: What is essential for our project development and delivery operations to run smoothly?
- Develop a project management framework: good foundation, reliable system.
- Improve risk management : reduce uncertainty.
- Increase communication : eliminate surprises, advance good decision making.

Teamwork + Tools + Process

Bryan district plan – Why was a plan or template developed?

- Project management framework (think sieve analysis):
 - Each element or tool focuses on a specific project management component or group of components.
 - Built in redundancy → complementary.
 - Provides documentation.
 - Some elements are forward-looking.
 - Should be done for all projects.
 - All elements are working documents.
 - What is missing?



Bryan District plan – Why was a plan or template developed?

- How does the PMP fit within project management framework?
- Focuses on 6 items → Plan of plans
 - Project description / Scope of work.
 - Schedule management plan.
 - Cost and budget management plan.
 - Communication plan.
 - Change management plan.
 - Risk management plan.

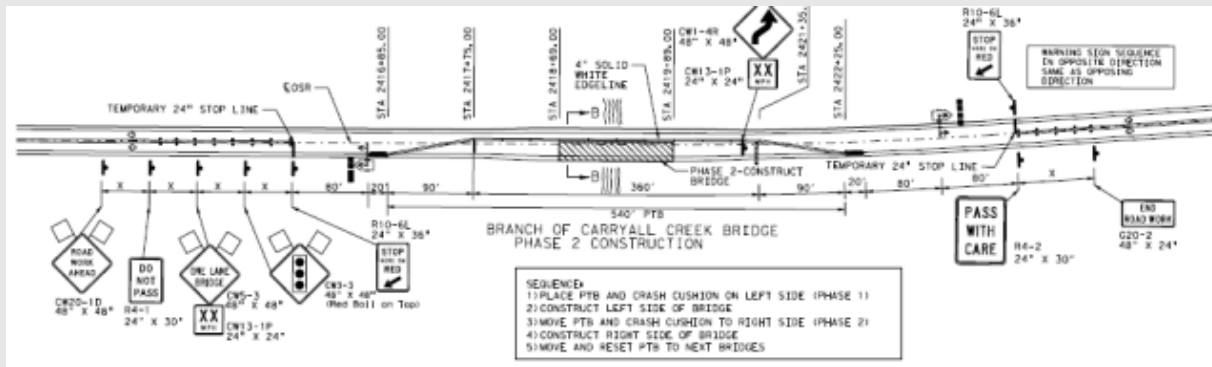
1	2	3	4	5	6	7	
No.	Date Identified	Date Updated	RBS1	RBS2	Status Active Dormant Retired	Opprotunity or Threat	
1	1						
Risk Management Plan							
Change Management Plan							
CCS: 000-00-000							
Project Title: x							
Project Manager: y							
Letting Date: *							
Cost & Budget Management Plan							
Construction Co							
Construction Co							
CCS: 000-00-000							
Project Title: x							
Project Manager: y							
Guidance							
State original sic							
Letting Date: MM/DD/YY							
State change to:							
Construction Completion Date: MM/DD/YY							
State impact to:							
Construction Cost: \$0							
Provide referenc budget is requir specified budget							
Consultant: XYZ							
Scope Change N							
WA Amount: \$0							
WA Execution Date: MM/DD/YY							
WA Termination Date:							
SWA1 Amount: \$0							
SWA1 Execution Date: MM/DD/YY							
SWA1 Termination Date:							
WA Total (WA + SWAs): \$0 ← Modify cell formula as needed if more than one SWA is issued.							
Physical % Complete: 0%							
Financial % Complete: 0% (per Invoices paid)							
Payment Method: (Lump Sum, Time & Materials, etc.)							
Invoicing Frequency: (Monthly, % Complete, etc.)							

Bryan District Plan – How was the template developed?

- Criteria:
 - Applicable to in-house and consultant projects.
 - Same basic elements regardless of project size.
 - Easy to use, and especially easy to maintain.
 - Flexible enough to modify based on need (planning vs. design vs. ROW)
 - Also could be used as a tracking document.
- Solution: Spreadsheet template
 - Working document: planning and tracking.
 - Communication tool relative to project execution and control.

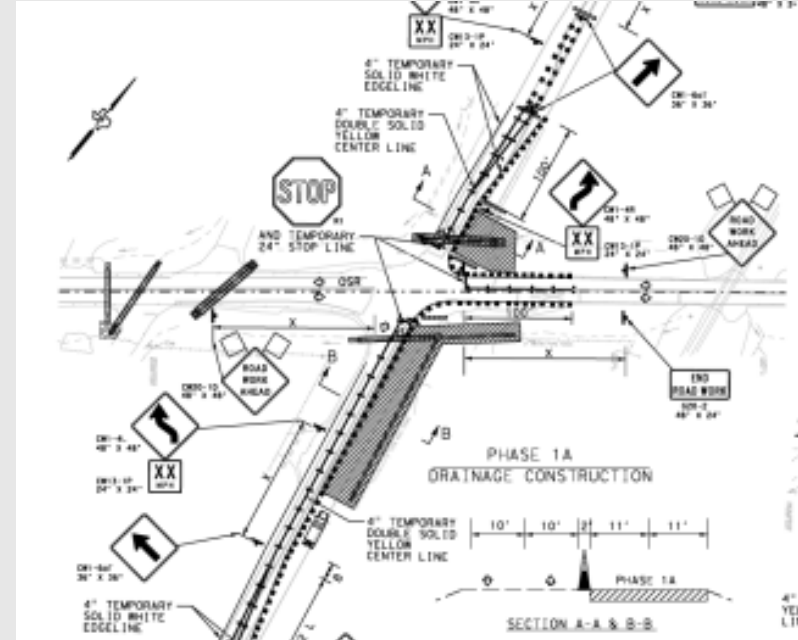
Bryan District plan – Which projects is the plan applied to?

- Projects of medium rigor and above:
 - Rehabilitation projects.
 - Planning-type projects, completed schematic development.
 - Projects that have major components of ENV, UTL, RR and ROW.
 - Projects with many external stakeholders, public involvement, etc.



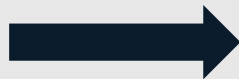
Bryan District plan – Which projects is the plan applied to?

- Why not for low-rigor projects?
 - Low-rigor projects: risk or uncertainty is generally well understood.
 - Short duration project development (e.g., flashing beacon).
 - Other measures (see framework) are in place to facilitate project execution and control.



Bryan District plan — Benefits of using the plan realized or anticipated?

- Improved documentation regarding budget, scope creep, risk, meetings.
- Communication is improving.
- Documentation provides continuity, if project managers change.
- Creates a project management discipline, good habits.



ACTION

- Operational cultural change that combines proactive project management with strong engineering design takes time to implement.

Bryan District plan — Lessons learned and best practices

- Keep it simple.
- Working document.
- For Bryan District, spreadsheets have worked well.
- In retrospect, develop your project management framework first, then present it to get buy-in from staff. They need to see the big picture.

PROJECT MANAGEMENT PLAN

CCSJ:	0475-03-064
Project Title:	OSR Rehabilitation Project
Project Manager:	Lorena Patranella

Will auto-popula

Table of Contents

1. Project Description & Scope of Work
2. Schedule Management Plan
3. Cost & Budget Management Plan
4. Communication Plan
5. Change Management Plan
6. Risk Management Plan

Questions for the Panel

- Linda Lindsay – Project Manager, Project and program Management
- Juan Quiroz – District Design Engineer, Bryan District
- Zelma Myers – Fort Worth District

Thank you!

PPM Field Agents



PPM FIELD AGENTS

PRIMARY FIELD AGENTS

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AVN, PTN, TRF

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TRV

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GCD, MNT, ROW, RRD, RTI

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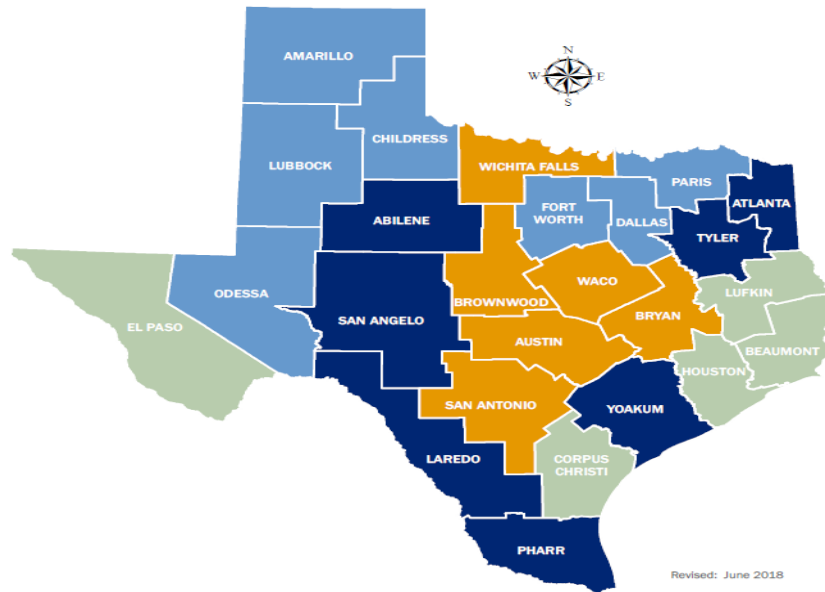
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