

Project Management Initiative



Community Development Agency

Admin/Finance • Development Services • Environmental Management
Transportation • Long Range Planning

Prepared for the
Board of Supervisors
January 27, 2014

Purpose of Today's Discussion



Update the Board

- Background
- Benefits
- Demonstration

Discuss Next Steps

Answer Questions

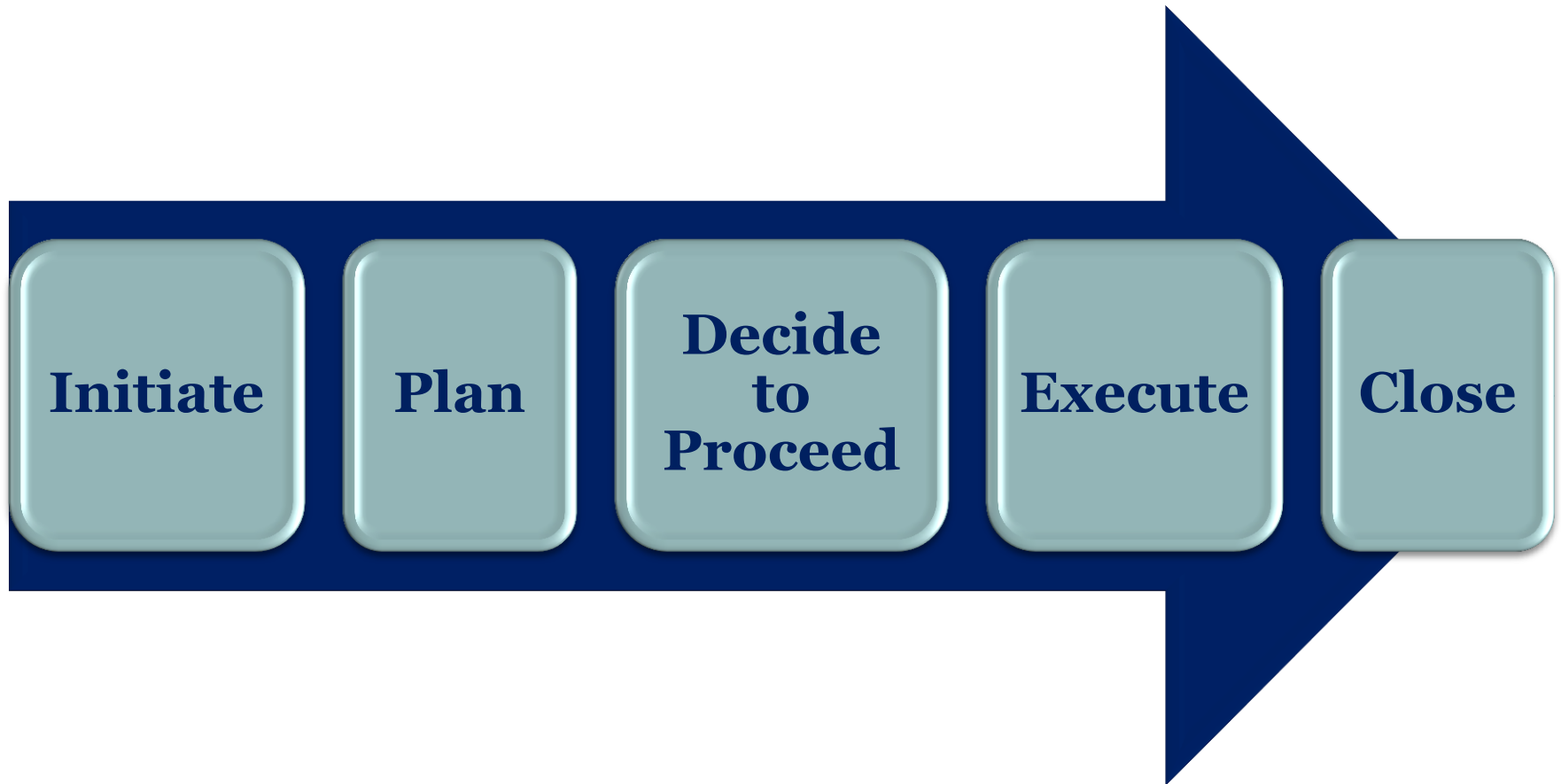
Project Management

Project¹ a temporary group activity designed to produce a unique product, service or result....A project is **temporary** in that it has a defined beginning and end in time, and therefore defined scope and resources (examples: implementation of FENIX, or the planning, design, and construction of a building or bridge)

Project management¹ is the application of knowledge, skills and techniques to execute projects effectively and efficiently. It's a strategic competency for organizations, enabling them to tie project results to business goals.

¹ Source: Project Management Institute website

Project Lifecycle



Tahoe

Tahoe initiates Project Management 2003 - 2005 Established an Accepted Project Delivery Process For Environmental Improvement Projects

Results

- Standardized Project Delivery Process
- Meet Funding Agencies Requirements
- Maximize use of internal and external resources
- Better at forecasting budgetary needs
- Increased efficiencies in delivering multiple Projects
- Adapted to the shortened Tahoe construction season

Rollout to CDA

Differences from Tahoe

Capital Improvement Projects (CIP)

- Increased complexity
- Higher costs
- Larger number of projects

Development Projects

- Specific Plans
- Tentative Maps
- Other discretionary development projects

Benefits

Projects On Time and On Budget

- Reduce Project Delivery Time
- Capture Historical Data to Improve Efficiencies and Reduce Cost
- Prioritize Projects

Improve Management Oversight

- Staffing vs. Consultant
- Real Time Project Information
- Budgeting & Scheduling

Deliver Better Customer Service

- Information Access
- Transparency

MS Project 2010



The tool that helps us achieve our
project management goals.

We're not done implementing it yet.


Project Management Initiative



Demonstration (CIP)


Project Web App Home Page



Site Actions ▾ Browse




 Project Web App ▸ Home


Project Web App Home ?



Reminders

Tasks
 You have 156 new tasks assigned to you.

Timesheets
 You have no late timesheets from your resources.
 You have no unsubmitted timesheets.

Approvals
 You have no task updates from resources pending your approval.
 You have no timesheets from resources pending your approval.
 You have no administrative time-off requests from resources pending your approval.

Status Reports
 You have no overdue status reports.

Issues and Risks
 You have no active risks assigned to you.
 You have no active issues assigned to you.

Navigation Menu:

- PWA Home
- Projects
 - Project Center
 - Approval Center
 - Workflow Approvals
- My Work
 - Tasks
 - Issues and Risks
- Resources
 - Resource Center
 - Status Reports
- Strategy
 - Driver Library
 - Driver Prioritization
 - Portfolio Analyses
- Business Intelligence
 - Reports
- Settings
 - Personal Settings
 - Server Settings
 - Manage Timesheets
- Manage
 - Manage Users
 - Manage Groups

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Project Center Page

Site Actions ▾ Browse Projects

New Project
 Open Project
 Update List
 Build Team
 Resource Plan
 Project Permissions
 Check in My Projects
 Close Tasks to Update
 Project Site

Zoom In
 Zoom Out
 Scroll to Project
 Outline
 View: ^Program Summary
 Filter: No Filter
 Export to Excel
 Print
 Subprojects
 Change

Time with Date
 Group By: No Group

Project

	Project Name	Start	Finish	Work	Duration	Cost	Owner	Last Published
PWA Home	53124 HOV 0	10/3/2011	12/8/2016	30,813.52h	1,296d	\$2,864,872.05	Paul Hom	1/15/2014
Projects	66109 Bass Lake Road Culvert	11/20/2012	11/24/2014	1,215.91h	503d	\$259,288.10	Monika Pedigo	9/27/2013
Project Center	71328 Silva Valley Pkwy Interchange	11/20/2012	5/9/2022	43,530.45h	2,363.88d	\$42,091,393.64	Adam Bane	10/15/2013
Approval Center	71333 Ponderosa Rd Interchange	4/8/2013	8/6/2015	393h	584.5d	\$52,745.28	Paul Hom	9/20/2013
Workflow Approvals	71346 Missouri Flat Interchange - Phase 1C	11/20/2012	10/2/2019	1,537.47h	1,715.01d	\$1,744,063.81	Monika Pedigo	10/10/2013
	71358 Francisco Rt Turn Pocket	8/2/2012	12/23/2015	2,240.47h	848d	\$786,984.47	Jennifer Rimoldi	10/23/2013
My Work	71359 Missouri Flat Interchange - Phase 1B2 Bike Path	11/20/2012	7/7/2016	2,262.34h	906d	\$3,512,011.01	Monika Pedigo	10/1/2013
Resources	72187 Ice House Road Rehabilitation	10/31/2013	8/20/2015	532h	450d	\$68,410.20	Valerie Akana	10/31/2013
Strategy	72304 and 72306 Northside School Class I Bike Path	11/20/2012	12/3/2020	4,031.02h	2,007.1d	\$4,168,616.71	Chandra Ghimire	10/9/2013
Business Intelligence	72307 Cameron Park Bike Lanes	3/15/2013	3/3/2020	422.8h	1,740d	\$145,291.75	Thor Larsen	10/1/2013
	72309 Green Valley Bike Lane	4/13/2012	12/28/2015	1,421.52h	926d	\$373,614.17	Thor Larsen	10/1/2013
Settings	72334 Diamond Springs Parkway Phase 2	9/2/2013	7/14/2027	11,312.35h	3,479.82d	\$3,469,287.88	Lance Gilbert	10/29/2013
Manage	72334 Diamond Springs Pkwy - Underground Utility District (With Phase 1A)	3/19/2013	12/17/2013	1,895.68h	194.25d	\$230,000.53	Paul Hom	7/22/2013
Libraries	72369 Hollow Oak Drainage	11/20/2012	6/19/2020	1,481.76h	1,893.1d	\$625,297.26	Dustin Harrington	10/2/2013
	72375 Diamond Springs Parkway - Phase 1A	11/20/2012	6/29/2022	35,530.13h	2,399.12d	\$4,753,392.67	Paul Hom	10/29/2013
	73120 Apache Ave-US50 Operational Study Planning	7/1/2010	9/3/2014	1,885h	1,043.38d	\$472,178.86	Donaldo Paleroan	3/25/2013
	73151 Green Valley Interconnect	10/19/2012	10/30/2015	1,168.5h	758d	\$308,954.72	Thor Larsen	10/2/2013
	73320 Pleasant Valley Patterson	1/1/2007	6/30/2021	16,145.05h	3,641d	\$4,798,540.13	Valerie Akana	10/2/2013
	73358 Pleasant Valley - Oak Hill	11/20/2012	4/27/2015	1,148.27h	605.98d	\$1,175,633.35	Mason Seed	1/2/2014
	73359 Letrobe	11/7/2012	4/6/2020	28,492.35h	1,849d	\$2,101,053.12	Mason Seed	7/30/2013
	73360 Cold Springs Road at Mt Shasta Ln	2/4/2011	1/8/2016	4,318.02h	1,231.4d	\$1,672,387.48	Mason Seed	1/2/2014
	73362 Salmon Falls Rd Realignment	1/1/2012	6/1/2021	2,381.25h	2,353.5d	\$1,205,714.34	Mason Seed	1/2/2014
	75107 75111 Silver Springs Driv	4/3/2013	7/5/2021	6,075.63h	2,222.14	\$5,127,428.53	Monika Pedigo	7/20/2013

Project Schedule View

Site Actions * Browse Project Task Options

Clipboard Project Editing Tasks Data Zoom

Status: Checked-in Last Modified: 10/29/2013 5:13 PM Version: Published

ID	Task Name	Duration	Start	Finish	Cost
0	72375 Diamond Springs Parkway - Phase 1A	2,399.12d	11/20/2012	6/29/2022	\$4,753,392.6
1	Diamond Springs Parkway (SLPP, MC&FP, TIM Funding)	2,399.12d	11/20/2012	6/29/2022	\$4,753,392.6
2	Project Initiation	140d	11/20/2012	6/13/2013	\$0.00
7	PLANNING PHASE	660d	11/20/2012	7/14/2015	\$150,206.20
234	DESIGN PHASE	442.33d	6/24/2013	4/2/2015	\$433,352.06
343	RW & UTILITIES PHASE	753.1d	11/20/2012	11/25/2015	\$217,871.00
479	ADVERTISE & AWARD PHASE	307.9d	3/2/2015	5/19/2016	\$29,248.98
540	CONSTRUCTION PHASE	134.09d	9/4/2015	3/23/2016	\$3,864,573.0
551	POST-CONSTRUCTION PHASE	1,822d	3/18/2015	6/29/2022	\$58,141.34
587	PROJECT COMPLETE	0d	6/25/2021	6/25/2021	\$0.00

Calendar view: /18/2012, 11/25/2012, 12/2/2012, 12/9/2012













Gantt Chart

- 72375 Diamond Springs Parkway - Phase 1A
- Project Details
- Project Information
- Schedule**

- PWA Home
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Resource Center Page

Site Actions ▾ Browse Resources

 New Resource
  Edit Resource
  Bulk Edit
  Open
  Outline
  View: Resources in Transpor
  Filter: No Filter
  Group By: Group
 Selected Resources
  Export to Excel
  Print
  Resource Assignments
  Resource Availability

Editing Data Show/Hide Share Navigate

	Resource Name	Max Util	Standard Rate	Type	Generic	Group	Resource Department	Last Mo
	Group: Associate Civil Engineer		\$125.13/h	Work				
<input type="checkbox"/>	Associate Civil Engineer	0%	\$125.13/h	Work	Yes	Associate Civil Eng	Transportation	5/17/20
<input checked="" type="checkbox"/>	Chandra Ghimire	76%	\$125.13/h	Work	No	Associate Civil Eng	Transportation	5/22/20
<input checked="" type="checkbox"/>	Dustin Harrington	76%	\$125.13/h	Work	No	Associate Civil Eng	Transportation	5/23/20
<input checked="" type="checkbox"/>	Dwight Anderson	74%	\$125.13/h	Work	No	Associate Civil Eng	Transportation	5/23/20
<input type="checkbox"/>	LD Associate Civil Engineer	0%	\$125.13/h	Work	Yes	Associate Civil Eng	Transportation	9/18/20
<input checked="" type="checkbox"/>	Mason Saed	80%	\$125.13/h	Work	No	Associate Civil Eng	Transportation	5/22/20
<input checked="" type="checkbox"/>	Monika Pedigo	76%	\$125.13/h	Work	No	Associate Civil Eng	Transportation	5/23/20
	Group: Associate Planner	51%	\$100.00/h	Work	No			
<input type="checkbox"/>	Aaron Mount	51%	\$100.00/h	Work	No	Associate Planner	Transportation, D	10/10/2
<input type="checkbox"/>	Tom Dougherty	51%	\$100.00/h	Work	No	Associate Planner	Transportation, D	10/14/2
<input type="checkbox"/>	Tom Purciel	51%	\$100.00/h	Work	No	Associate Planner	Transportation, D	10/10/2
	Group: Consultant				Yes			
<input type="checkbox"/>	Contractor_Tahoe	100%		Cost	Yes	Consultant	Transportation	9/9/201
<input type="checkbox"/>	Contractor_WestSlope	100%		Cost	Yes	Consultant	Transportation	9/9/201
<input type="checkbox"/>	Env consultant - hourly	0%	\$140.00/h	Work	Yes	Consultant	Transportation	9/19/20
<input type="checkbox"/>	Env consultant - lump sum	100%		Cost	Yes	Consultant	Transportation	9/18/20
<input type="checkbox"/>	Geotechnical Consultant	100%		Cost	Yes	Consultant	Transportation	9/5/201
<input type="checkbox"/>	Inspector Consultant	0%	\$150.00/h	Work	Yes	Consultant	Transportation	9/9/201
<input type="checkbox"/>	LD Consultant	0%	\$200.00/h	Work	Yes	Consultant	Transportation	9/18/20
<input type="checkbox"/>	Material Testing	100%		Cost	Yes	Consultant	Transportation	9/18/20
<input type="checkbox"/>	RE Consultant	0%	\$180.00/h	Work	Yes	Consultant	Transportation	9/9/201
<input type="checkbox"/>	Right-of-Way Consultant	100%		Cost	Yes	Consultant	Transportation	9/5/201
<input type="checkbox"/>	Right-of-Way Consultant Acquisitions	0%	\$110.00/h	Work	Yes	Consultant	Transportation	10/23/2
<input type="checkbox"/>	Roadway/Structures Design Consultant	100%		Cost	Yes	Consultant	Transportation	9/5/201
<input type="checkbox"/>	Structure Rep	0%	\$180.00/h	Work	Yes	Consultant	Transportation	9/9/201

Projects
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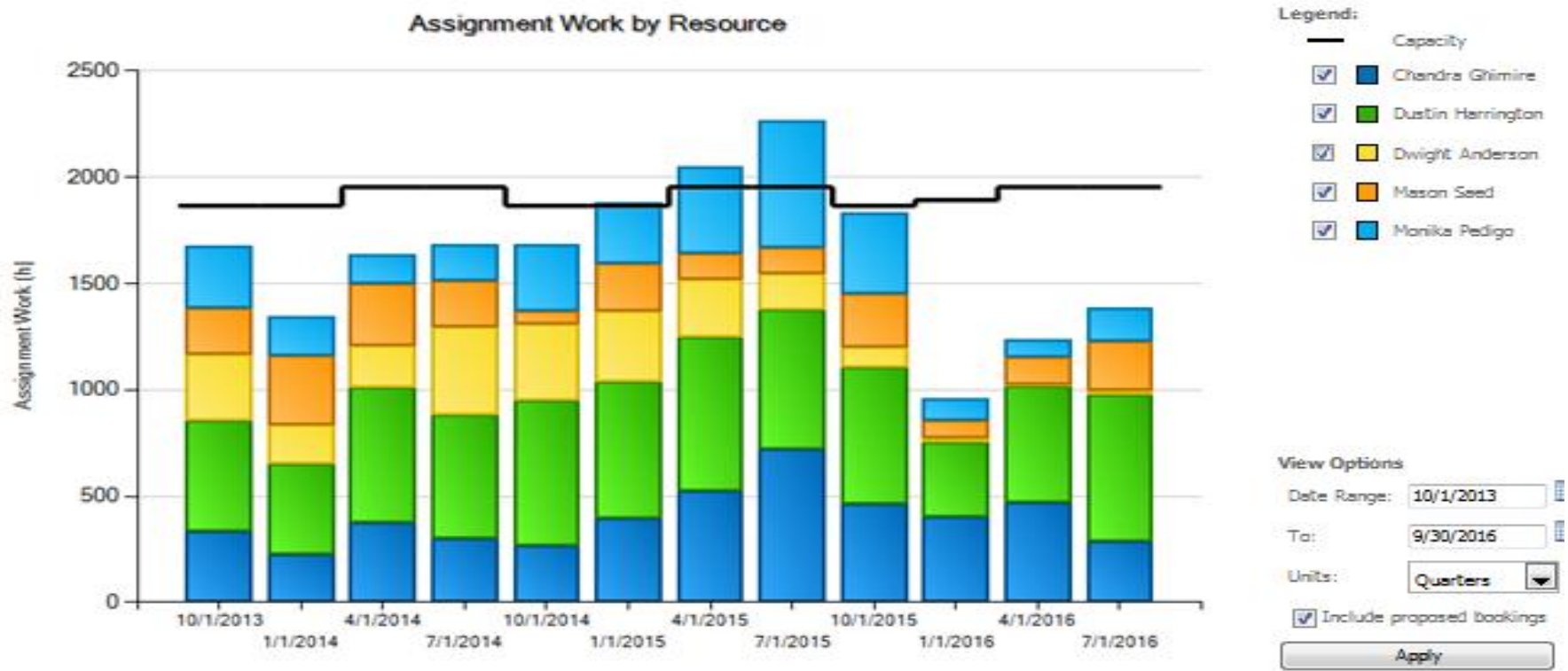
Resource Availability

Site Actions ▾ Browse Availability

View: Assignment Work by resour ▾

Export to Excel Print Resource Center Resource Assignments

Views Share Navigate



Budget vs. Actual Report

CIP Actual Expenses vs. Scheduled

Project: 71346

Labor Posted: 07/01/2012 - 08/28/2013 (100% of Year)

Missouri Flat Interchange Phase 1C - Riparian Restoration

DRAFT

<u>CIP Activity</u>	<u>Employee</u>	<u>Actual Hours</u>	<u>Planned Hours</u>	<u>Actual Cost</u>	<u>Planned Cost</u>
<i>71346 Totals by Activity</i>					
Planning	2.1 Planning Phase (Inactive for Charging)				
	2.2.1 PI01 \$ Project Start	0.00	23.00	\$0	\$2,941
		0.00	23.00	\$0	\$2,941
	Bal:		23.00	Bal:	\$2,941
Design	3.1 Design Phase (Active for Charging)				
	3.1.1 DPO01 Design Oversight	89.00	50.31	\$11,818	\$7,346
	3.1.2 DPO02 Design Contracts, Co-ops, & Agreements	15.75	0.00	\$1,893	\$0
	3.2.4 DPS04 Utility Coordination - "B" Letter	0.25	0.00	\$31	\$0
	3.2.5 DPS05 Environmental Permits	2.00	0.00	\$250	\$0
	3.3.2 PFPS02 95% Specs & Estimate	2.00	0.00	\$250	\$0
	3.3.3 PFPS03 95% PS&E Review	19.75	0.00	\$2,471	\$0
	3.3.4 PFPS04 Utility Coordination - "C" Letter	1.00	0.00	\$125	\$0
	3.4.2 FPS02 \$ 100% Specs & Estimate	0.00	22.00	\$0	\$2,850
	3.4.3 FPS03 \$ 100% PS&E Review	0.00	89.00	\$0	\$11,930
		129.75	161.31	\$16,840	\$22,126
	Bal:		31.56	Bal:	\$5,286
RW & Utilities	4.1 RW & Utilities Phase (Active for Charging)				
	4.1.1 RUPO01 RW & Utilities Oversight	3.50	11.06	\$410	\$1,313
	4.1.2 RUPO02 RW Contracts, Co-ops, & Agreements	0.25	0.00	\$30	\$0
	4.2.1 RW01 \$ RW Authorization	0.00	13.00	\$0	\$1,536
	4.2.3 RW03 \$ RW Appraisals-update for TCE	0.00	16.00	\$0	\$1,779
	4.2.4 RW04 \$ RW Acquisition- MoFlat1c TCE north of bridge off of H	0.00	38.00	\$0	\$4,225
	4.3.1 U01 \$ Utility Company Contracts/ Letters of Concurrence	0.00	6.50	\$0	\$831
	4.4.1 RWC01 \$ RW Certification	0.00	10.50	\$0	\$1,175
	4.4.2 RWC02 \$ Escrow Procedures	0.00	17.93	\$0	\$1,993
			3.75	112.99	\$440
	Bal:		109.24	Bal:	\$12,412

Budget vs. Actual Report

CIP Actual Expenses vs. Scheduled

Labor Posted: 07/01/2012 - 08/28/2013 (100% of Year)

Project: 71346

Missouri Flat Interchange Phase 1C - Riparian Restoration

DRAFT

	<u>Employee</u>	<u>Actual Hours</u>	<u>Planned Hours</u>	<u>Actual Cost</u>	<u>Planned Cost</u>
Advertise & Award	5.1 Advertise & Award Phase (Inactive for Charging)				
	5.1.1 AAPO01 \$ Advertise & Award Oversight	0.00	14.00	\$0	\$1,835
	5.2.1 AA01 \$ Construction Authorizations	0.00	5.25	\$0	\$789
	5.2.3 AA03 \$ Advertise	0.00	75.00	\$0	\$10,151
	5.2.4 AA04 \$ Award	0.00	16.00	\$0	\$2,266
		0.00	110.25	\$0	\$15,041
		Bal:	110.25	Bal:	\$15,041
Construction	6.1 Construction Phase (Inactive for Charging)				
	6.4 CE01 Construction Engineering	0.00	20.00	\$0	\$2,503
		0.00	20.00	\$0	\$2,503
		Bal:	20.00	Bal:	\$2,503
	7.1 Post-Construction Phase (Inactive for Charging)				
	7.2.2 PC02 \$ As-Built/Archives	0.00	66.00	\$0	\$8,534
	7.2.4 PC04 \$ Environmental Monitoring	0.00	28.00	\$0	\$3,593
	0.00	94.00	\$0	\$12,127	
	Bal:	94.00	Bal:	\$12,127	
71346 Grand Totals		133.50	521.55	\$17,280	\$67,590
	Bal:	388.05	Bal:	\$50,310	

Project Management Initiative



Demonstration (Land Use)

Next Steps

1. Load and test Land Development projects
2. Input all CIP projects
3. Project Management training
4. Internet-accessible reports for:
 - Staff
 - Management
 - Board
 - Public
5. Integrate Project Management System
 - FENIX
 - Project Budget
 - Timecards/Payroll
 - Other systems

Return to the Board with an update.

Contributors



- **CDA Transportation**

- Bard Lower
- John Kahling
- Matt Smeltzer
- Steve Kooyman
- Adam Bane
- Paul Hom
- Thor Larsen
- Chandra Ghimire
- Dustin Harrington
- Mason Saed
- Monika Pedigo
- Jennifer Rimoldi
- Dave Friestad
- Janet Postlewait
- Dave Spiegelberg
- Dan Kikkert
- Donaldo Palaroan
- Val Akana
- Teresa Russell
- Greg Hicks
- Eileen Crawford
- Janel Gifford

- **CDA Long Range Planning**

- Dave Defanti
- Brendan Ferry
- Anne Novotny
- Claudia Wade
- Jean Warner

- **CDA Admin/Finance**

- Kate Sampson
- Ruth Young
- Elizabeth Zangari
- Mike Pavlick
- Patrick O'Donnell

- **Information Technologies**

- David Russell
- Lisa Barnes
- Michael White
- Craig Pooley
- Lance Gilbert
- Brian Priddin
- Jason Bourne
- Lenny Voet

- **CDA Development Services**

- Roger Trout
- Peter Maurer
- Mel Pabalinas
- Aaron Mount
- Tom Purciel
- Tom Dougherty
- Lillian MacLeod
- Gina Paolini

Project Management Initiative



Questions

Project Life Cycle

