

PS&E Dashboard Metrics

Definitions:

PS&E Locked-In Date:

Similar to the current 13-month lock-in date for bid-let dates, this is the PS&E Due Date as agreed to 13 months prior. As with the current bid-let lock in, the 90 day window means 90 days after the lock date or earlier, there is no penalty for being early. This is measured against the PS&E Acceptance date and is used only in the QBR reports.

PS&E Due Date:

Agreed to date between the Office of Project Letting and the project team. At the time of the 13-month locking, the PS&E Due Date is the same as the PS&E lock-in date. The date is determined based on a proposed bid date and subtracting the required amount of time for all activities prior to bid let such as printing, advertisement, OPL review, etc. The needs for advertisement and Full Federal Oversight are determined based on the information provided from the project team. As project information changes (size of project etc) this date may change to accommodate the current scope of the project (longer ad, Full Federal Oversight etc) or revised delivery needs from the Region (changed bidding time etc). Establishing the PS&E due date has no change from the current process. This date can and will change as project teams change desired bid dates, as this date doesn't "freeze".

Note: With Bid dates currently on Thursdays, PS&E due dates will always be 8am on Monday. Projects will be triaged on the date submitted for completeness. If a package arrives later than 8am on the due date, workload may not allow for triaging on that date, and it will likely be counted as submission on the following day.

PS&E Submission Date:

Actual date the Office of Project Letting receives the PS&E package (see note above).

Note: If a project is received early, all attempts will be made to check-in the project for completeness upon submission, however workload may not always allow that. It will be triaged on the due date, if workload doesn't allow earlier. All efforts will be made to adjust measures accordingly.

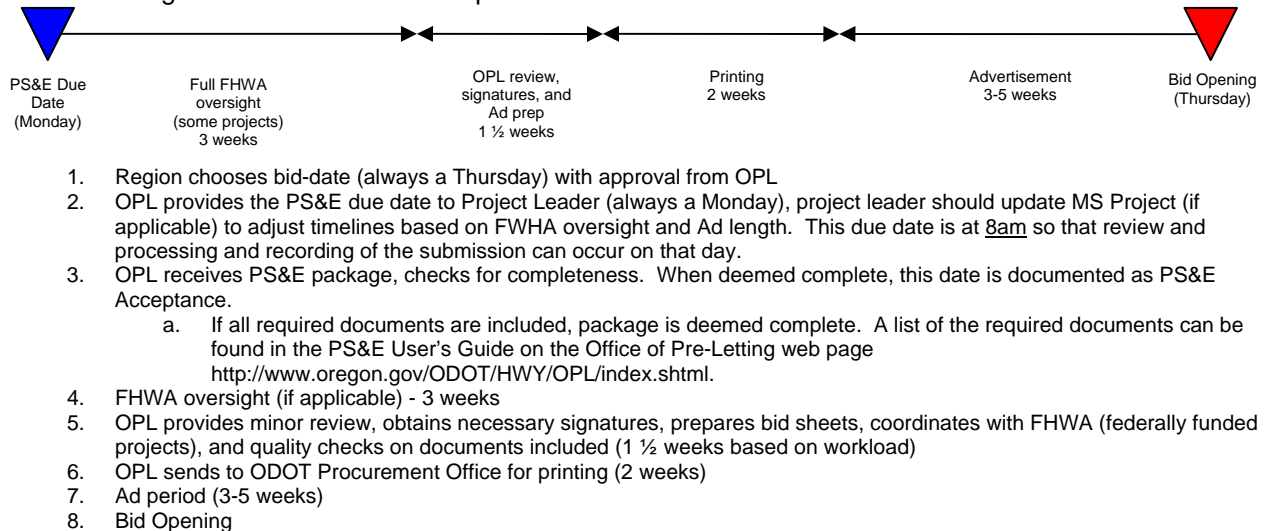
PS&E Acceptance Date:

Actual date the Office of Project Letting receives the **complete** PS&E package.

Note: a signed PD-02 exception letter (and FWHA approval to advertise if necessary) will deem a package complete if covers the items that are missing.

Background on Office of Pre-letting Process:

The following is the outline of the OPL process.



Discussion of Performance Measures:

In a November 2007 memo, PDLT changed the performance measures for 3 key milestones of project delivery. The performance measure change from Bid Date to PS&E Acceptance will allow flexibility in the delivery model, while providing clear accountability for the different organizations. The comparison of the PS&E Locked-in Date and the PS&E Acceptance Date will occur in the QBR. This change from tracking Bid-let dates to PS&E is a definite step in the right direction. However, this measure alone does not provide the feedback and communication needed to the delivery organizations for them to in turn adjust training, staffing and other needs within their unit. Additional data is needed for the Technical Center unit managers and equivalent, to allow adequate adjustments in operations if needed. The following proposal addresses this additional data, as well as some of the communication requested in the 2007 Project Delivery Review section 3.3.2.

Dashboard metrics:

Additional dashboard metrics will be available to assist delivery organizations with the information they need to effectively manage their program. 3 Key questions should be answered:

1. Are we (as a Region/OBDP) delivering on time?
2. Is our package complete when it gets to OPL?
3. What are we missing?

OPL can collect a variety of data and show it in a variety of ways. To keep data collection and reporting simple, OPL proposes to answer the above questions in the following ways. OPL is very open to changing and adjusting these dashboard metrics as needed to assist the delivery organizations, but will adjust the metrics on a consistent statewide basis. Raw project data is also available upon request.

1. Are we delivering on time?
 - a. Provide a rate that compares the PS&E submission date and the PS&E due date
 - b. **# of projects where PS&E Submission date is at or before the PS&E Due Date**
of projects
 - c. Display rate on statewide graph summarized by the last 4 quarters and a 12 month running average (show all regions/OBDP)
 - d. This will be a different metric than the QBR. The QBR may show 100% on time because of the 90 day window, where this metric may show 0% on time because they were all several days late.
2. Is our package complete when it gets to OPL?
 - a. Provide a rate that compares the PS&E acceptance date and the PS&E Submission Date
 - b. **# of projects where PS&E Submission date is equal to the PS&E Acceptance Date**
of projects
 - c. Display rate on statewide graph summarized by the last 4 quarters and a 12 month running average (show all regions/OBDP)
3. What are we missing on projects that aren't complete?
 - a. OPL currently is not specifically capturing this information in a database, but has paper copies available. Past project information is available on request.
 - o OPL to provide a short report that lists project names that weren't submitted as complete, the number of items missing, and a comment field noting the missing items.

Audience and Frequency:

To address the needs for evaluating our organization's performance, as well as our needs for proactive improvement, OPL proposes providing the above dashboard metrics in a more informal setting, to facilitate the metric being used for improvement, training, etc. OPL is available for discussions, clarifications, etc upon request.

Type	What	Audience	Frequency	Data Source & distribution
Performance Measure	PS&E Acceptance vs 13 month lock-in & 90-day window	PDLT, Region Management, etc	Quarterly, as part of the QBR. Ex: Oct-Dec shared in Feb	John Turner prepares data and includes in the QBR
Dashboard metrics	Are we delivering on time? Is our package complete when it gets to OPL? What are we missing?	Tech Center Managers, Area Managers, LAL managers (Planning or Area in some regions)	Quarterly, on same timeline as QBR** ** until the QBR converts to PS&E vs Bid Dates, the end of quarter cut-offs might not match (QBR shows projects bidding Oct-Dec, Dashboard shows projects with PS&E due Oct-Dec).	OPL prepares and sends out report via email to Tech Center Managers and Area Managers as well as posted on OPL's website. OPL is available for discussions and clarifications upon request.

Additional discussion / potential future additions:

Sortable/Clear data on trends for what is missing: Although our database isn't currently set up to collect this data independently, it could be modified to provide reports on most commonly missed items. This would take some effort to not only incorporate into the database, but also to maintain for each project.

Additional metric for changing the PS&E due date within the 6-month contractor letting publication: The proposed metrics allow a project team to repeatedly change the bid date / PS&E due date of a project, without any indication of how or when the change was made. There may be a need to monitor the changes within the 6-month look ahead for contractors.

Contact Information:

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