



PROJECT DELIVERY LEADERSHIP TEAM

OPERATIONAL NOTICE

NUMBER	REVISION #	SUPERSEDES	EFFECTIVE DATE	VALIDATION DATE	RESCINDED DATE
PD-19	NEW		10-7-2008		
SUBJECT			TOPIC/PROGRAM		
Project Scheduling/Resourcing			Project Management Business Practices		

**PURPOSE:**

To set expectations for the business lines regarding project scheduling and resourcing during the project development/design phase of project delivery, and identify key roles and responsibilities.

**BACKGROUND/RATIONALE:**

A scheduling, resource management and reporting tool is essential to the health of the project delivery organization. Accurate, timely schedule and resource data is required to inform project delivery decision-making at local, regional and statewide levels.

Project scheduling and resourcing are needed to accomplish two primary functions: to identify project demands and to identify how to accomplish those demands. A scheduling and resourcing method needs to ask and answer a number of questions in the following areas to be useful in project delivery.

- Identify project demands such as scope, deliverables, work break down structure, milestones, task durations, due dates, etc.
- Identify resource demands such as ODOT resources required for deliverables, staff utilization, outsourcing needs, resource sharing, etc.
- Inform program decisions such as flex service/full service contracting needs, schedule adjustments, resource adjustments, etc.

This document is intended to provide the project delivery business line with direction and expectations concerning project scheduling and resourcing within ODOT. What follows should be interpreted as the minimum standard for all STIP projects that require a schedule in the Resource Management System (RMS).

**SCOPE:**

Any STIP project that is expected to use technical resources must have a schedule and be resourced in the Resource Management System. This includes in-house, outsourced, and local agency projects as determined by the criteria identified in the Resource Management System Utilization Reports. (See *Scheduling/Resourcing Guide* for details.)

The expectations in this Notice apply to the project development phase; however, the integration of planning project scheduling and resourcing is anticipated.

## **DIRECTION/EXPECTATIONS:**

ODOT uses a corporate Resource Management System. The required scheduling and resourcing tool for all project management is MS Project and MS Project Server. All applicable staff and managers are expected to use the corporate system timely and effectively, according to these standards. Each region is expected to identify a Resource Management System expert to support the region in its utilization of the system.

Regions are expected to develop a process/procedure to assure all resource units are aware of schedule changes that affect their work, and a process/procedure to assure all project management staff are aware of all resource changes that affect the schedule.

When a region develops additional scheduling and/or resourcing expectations or procedures, above the statewide standards, the region PDLT is expected to document those procedures and practices for consistency across the region practitioners as well as for communication with central functions or other regions when resource sharing occurs.

### **Schedule Management Expectations**

- ***Templates***

Regions are expected to develop and maintain region-based schedule templates. These templates must include, at a minimum, the approved, standard statewide (corporate) milestones and activities. (See *Scheduling/Resourcing Guide* for details.)

- ***When should a project schedule be published to the Enterprise Server?***

A key objective in Project Delivery is to publish all schedules as early as possible so that resource managers have a complete portfolio of all activities they are expected to accomplish and can forecast resource need. Publishing a project schedule to the server is required to allow schedule information to be accessed and viewed.

Project schedules shall be initiated, developed and published to the server at draft STIP, per PD-02. Project schedules shall be published to the server after each revision that affects the critical path or that require resource units to adjust their work effort.

- ***When should a project be baselined?***

Baselining a project schedule allows a previously published schedule to be compared to the most current schedule. This is required to inform organizational performance analysis, program/project management and continuous improvement.

At a minimum, project schedules shall be baselined at the completion of the Project Initiation and Design Acceptance milestones. Project schedules must also be baselined when significant changes to a project occur as part of the change management process.

- ***How often should project schedules be updated?***

Regions are expected to actively maintain and manage project schedules. This includes reviewing, updating, and re-publishing (when required) detailed project schedules on or before the last working day of each month. Project schedules must be updated and published immediately when changes that impact the critical path or require resource units to adjust work effort occur.

▪ ***What does reviewing and updating a project schedule entail?***

Reviewing includes referring to the published schedule and comparing the published schedule with the current project work plan. Updates are made to adjust tasks and milestones to reflect the current work plan.

## **Resource Management Expectations**

### ***When should a project be resourced?***

Generic names in the project schedule must be exchanged for actual staff members at or before the project kickoff meeting and related events. Also during this time, any major duration changes to the schedule need to be adjusted.

After kickoff, additional duration, effort and activity adjustments to the schedule need to be made as the scope of the project is more defined.

Any changes in staffing, workload or project issues, or any other factors that impact task delivery timeframes – regardless of perceived float in the schedule – must be communicated to the project team and updated immediately.

## **ROLES & RESPONSIBILITIES:**

### **Region System Experts**

- Provide expert system advice, counsel and technical support to the region.
- Maintain region template(s).
- Work with system manager and system administrator and other partners/regions to identify improvements and resolve issues.

**Schedule Manager** - Project Leader (PL), Local Agency Liaison (LAL), Project Manager (PM) or other role responsible for the leading the project management aspects of the project.

- Initiate and facilitate a timely process for developing, publishing and resourcing the schedule.
- Actively manage and maintain the schedule.
- Review and update the schedule with the project team regularly.
- Ensure schedule is baselined and republished as needed.
- Identify and resolve duration conflicts with resource managers.

### **Resource Managers**

- Replace generic resources with staff names.
- Approve task status; monitor progress towards completion of deliverables.
- Publish new and changed assignments.
- Identify and resolve resource conflicts with schedule manager.
- Assist in schedule development and management.

### **Resources**

- Report task status.
- Assist schedule manager in schedule development and management.

### **Area Managers**

- Manage the change management process.
- Participate in outsourcing decisions.
- Manage the project delivery program in their area.

### **Tech Center Managers**

- Forecast generic resource needs.
- Participate in outsourcing decisions.
- Ensure that technical aspects of project development in the region are delivered on-time.

### **System Administrator (Project Delivery Unit)**

- Provide customer service/support for scheduling and resource management system users.
- Lead system application development and maintenance processes.
- Maintain and update system data tables and network functions.
- Manage day-to-day operations of the RMS system and resolve issues.

### **System Manager (Project Delivery Unit)**

- Develop and manage projects related to major system improvements, software upgrades, and business process changes.

### **REFERENCES:**

- [PD-01](#)
- [PD-02](#)
- *Scheduling/Resourcing Guide* – to be developed
- Region Templates – to be developed