



2019 Transportation Project Delivery Conference

October 2019

Welcome!



 **Poll Everywhere**
Text 2019TPD to 22333
once to join

Submit Feedback
PPM_Helpdesk@TxDOT.gov

 **#2019TPD**

2019 Transportation Project Delivery Conference

October 2019

2

Safety Briefing – Double Tree by Hilton



For Medical Emergencies

- Please call 911
 - Address: 6505 IH-35 North, Austin, TX 78752

In Case of Tornado/Inclement Weather

- Stay inside
- Move away from exterior walls and windows
- Shelter in this room

In Case of a Fire, or other need to evacuate building

- Fire Extinguishers are marked and located in hallways
- We will evacuate through exit doors to the right and proceed to the green space in front of the hotel – South towards Pappadeaux

In Case of Active Shooter/Bomb Threat

- Follow instructions from the public address system and onsite personnel



2019 Transportation Project Delivery Conference



DoubleTree by Hilton Hotel Austin
6505 N Interstate 35
Austin, Texas 78752-4346

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 **#2019TPD**

Thank You, Exhibitors!



DANNENBAUM







Opening Speaker

2019 Transportation Project Delivery Conference

October 2019



Brian Barth, P.E.
Texas Department of Transportation
Director of Project Planning &
Development



2019 Transportation Project Delivery Conference

DoubleTree by Hilton Hotel Austin
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 Austin, Texas 78752-4346

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DANNENBAUM







Project Delivery Perspectives

2019 Transportation Project Delivery Conference

October 2019

Panel Members



Brian Barth, P.E.
Texas Department of Transportation
Director of Project Planning &
Development



Michael Lee, P.E.
Texas Department of Transportation
Director of Engineering &
Safety Operations



Project Management Foundation

Transportation Project Delivery Conference

October 2019

Session 1 Speakers



Regaynal Poplion
Right of Way Division
Texas Department of Transportation



Darren McDaniel
Transportation Programs Division
Texas Department of Transportation

Defining Terminologies



- Project
- Program
- Portfolio



Project

A temporary endeavor undertaken to create a unique product, service or result.



Project Management

The application of knowledge, skills, tools and techniques to project activities to meet the project requirements.

Examples of Transportation Projects Managed at TxDOT:

- Bridge replacement
- Median barrier installation
- Signal improvement at an intersection
- Seal coat project on a rural highway
- Converting undivided highway to divided highway
- Constructing a hike and bike trail



Process Groups

What Project Managers **DO**

- Initiating
- Planning
- Executing
- Monitoring & Controlling
- Closing

Knowledge Areas

What Project Managers need to **KNOW**

- Integration Management
- Scope Management
- Schedule Management
- Cost Management
- Risk Management
- Quality Management
- Communication Management
- Stakeholder Management
- Resource Management
- Procurement Management



Program

Related projects that are managed in a coordinated manner to obtain benefits not available from managing them individually.



Program Management

The application of knowledge, skills, and principles to a program to achieve the program objectives and obtain benefits and control not available by managing program components individually.

Examples of Transportation Programs Managed at TxDOT:

- CAT 6 – Bridge Program
- CAT 8 – Safety (HSIP)
- I-35 Program
- Preventive Maintenance Plan
- CAT 4 – Connectivity
- Local Government Program



Portfolio

Projects, programs, subsidiary portfolios, and operations managed as a group to achieve strategic objectives.



Portfolio Management

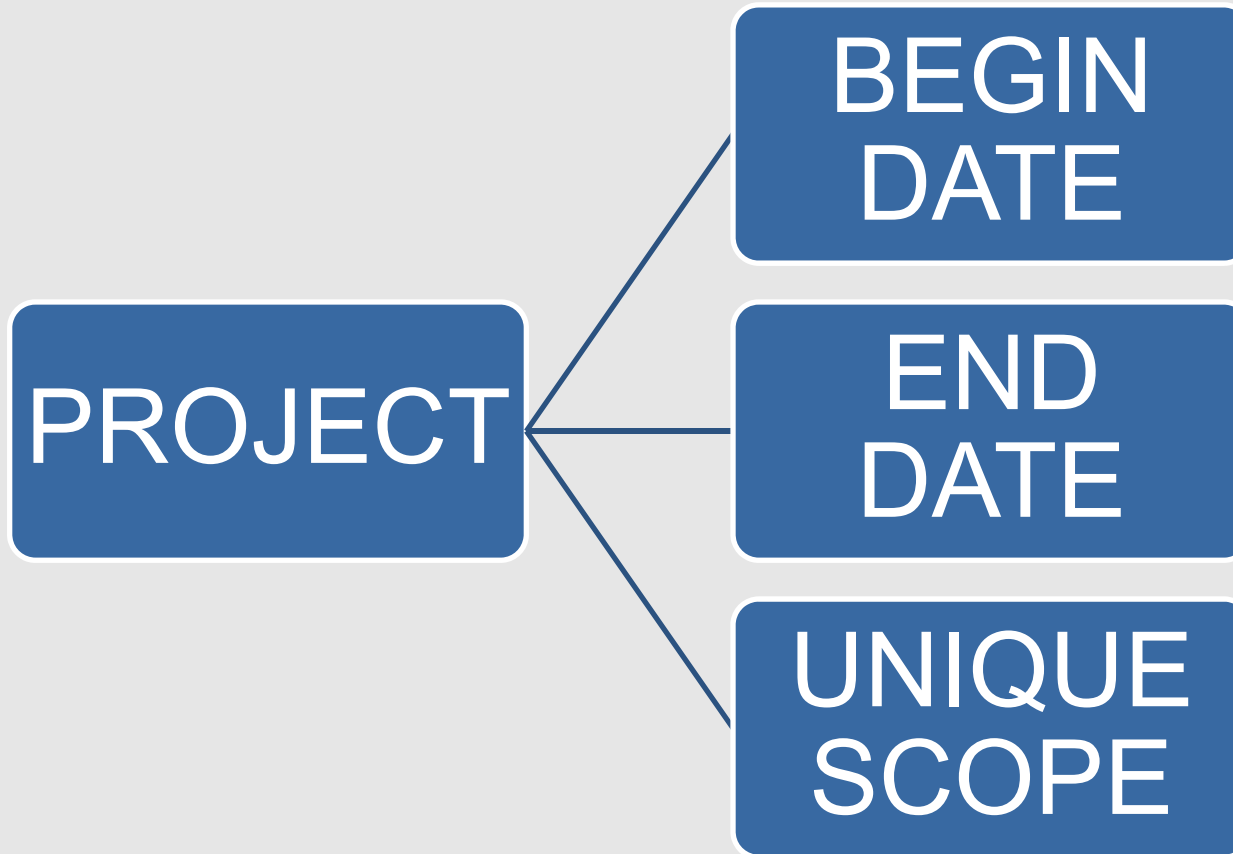
The centralized management of one or more portfolios to achieve strategic objectives.

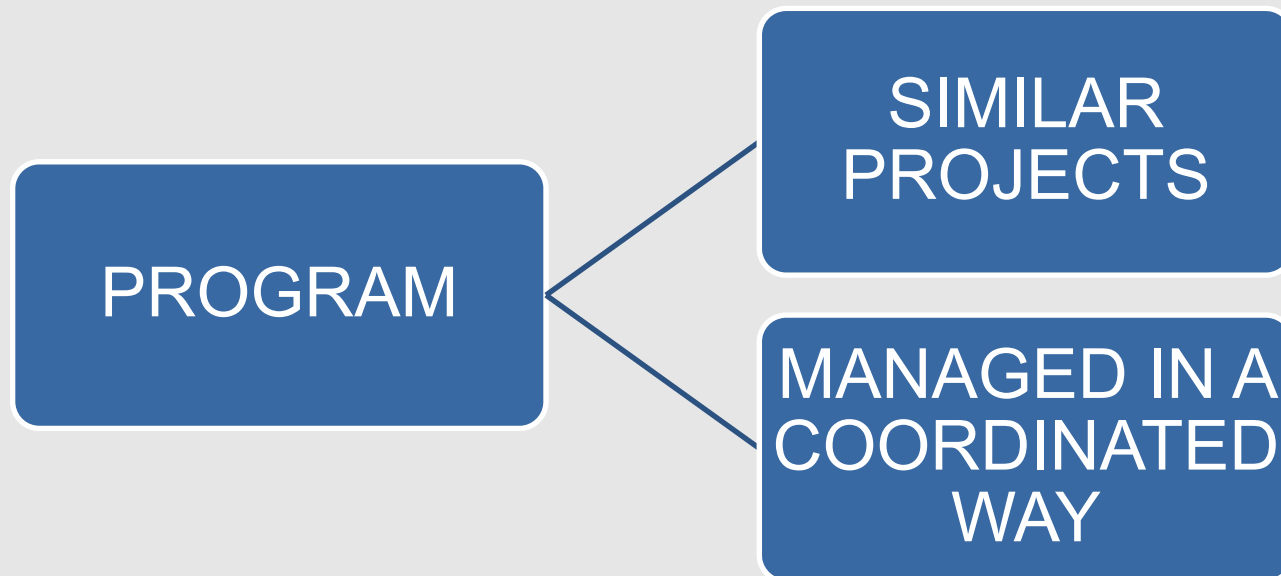
Examples of Transportation Portfolios Managed at TxDOT:

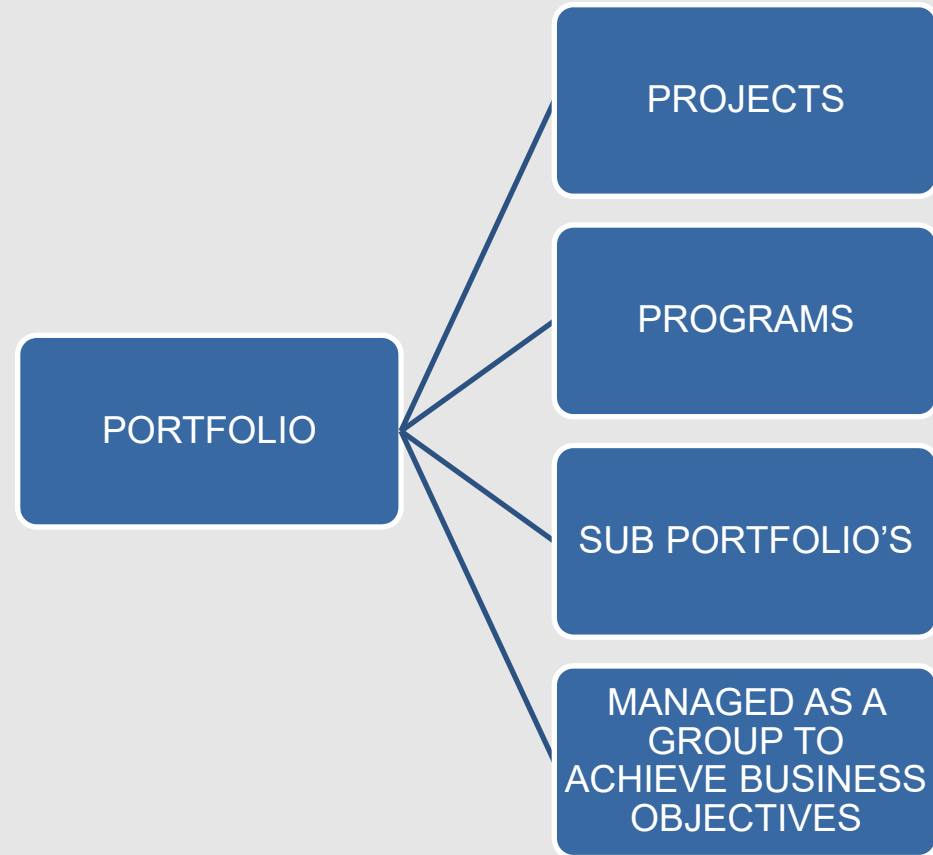
- Agency Portfolio
- District Portfolio
- ROW Portfolio



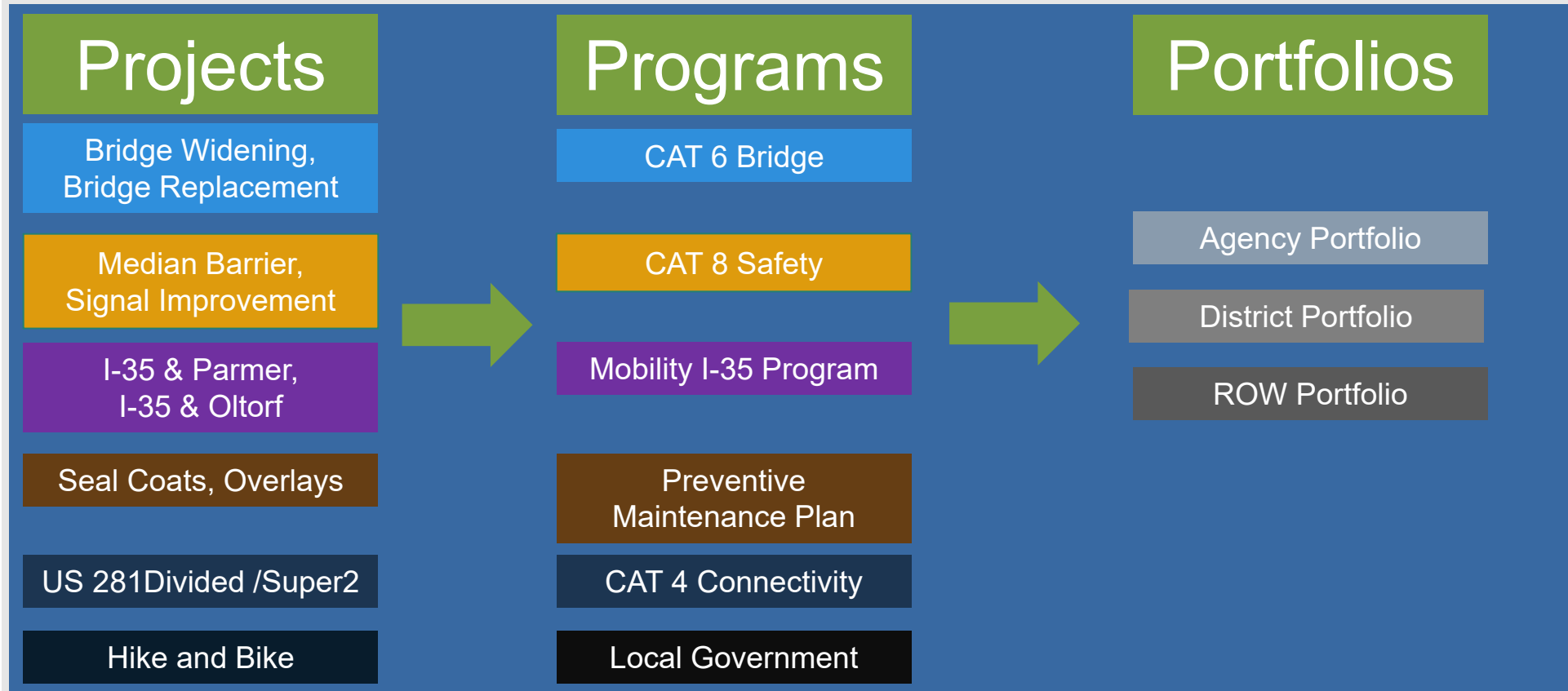
RECAP







Project, Program and Portfolio Management Relationship



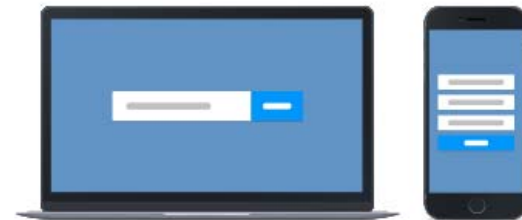


Join by Text



- 1 Text the number **22333**
- 2 Text the message **2019TPD**

Join by Web

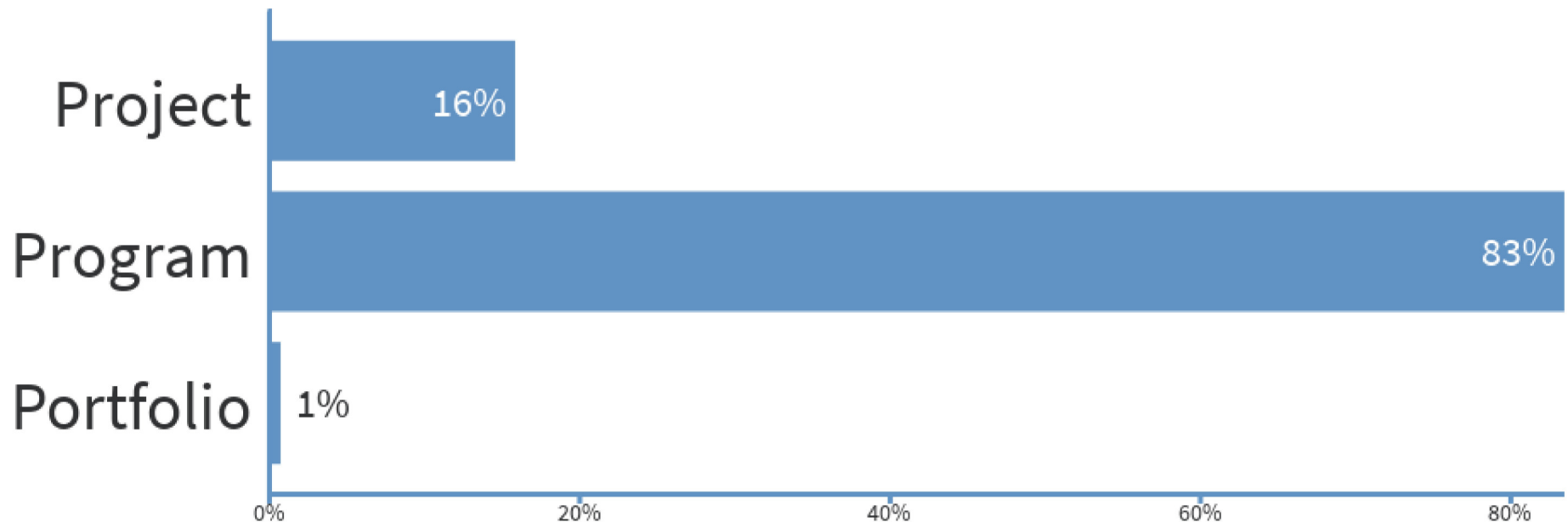


- 1 Go to **PollEv.com**
- 2 Enter **2019TPD**
- 3 Respond to activity

🗨 When poll is active, respond at **PolleEv.com/2019tpd**

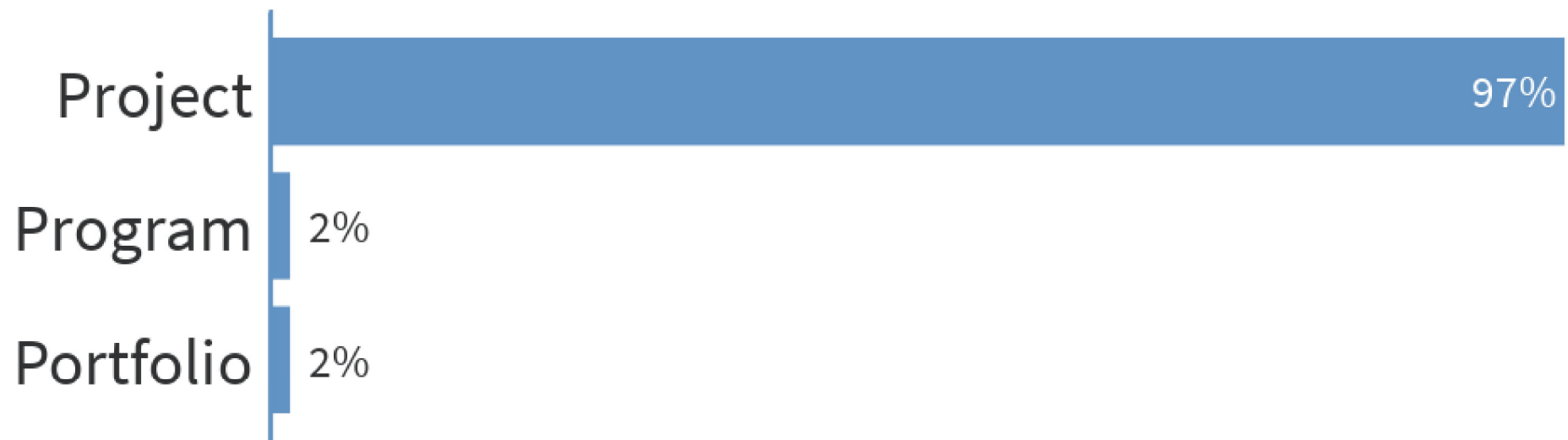
📱 Text **2019TPD** to **22333** once to join

Widening all narrow highways (less than 24 feet wide) to improve safety.



🗨 When poll is active, respond at **PolleEv.com/2019tpd**
📱 Text **2019TPD** to **22333** once to join

Upgrading a highway from 2 lanes to 4 lanes with a construction budget of \$2.1 million beginning in Spring 2020 and expected completion in Fall 2021.



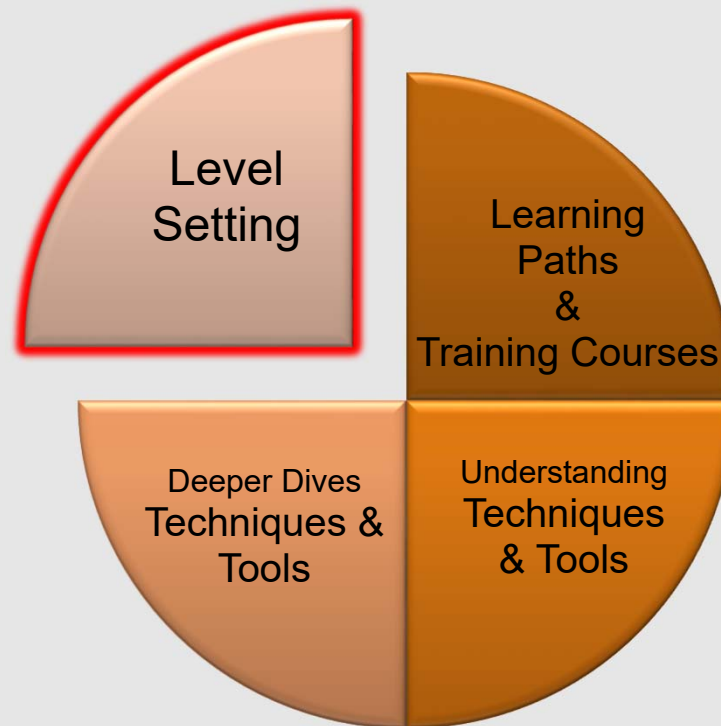
🗨 When poll is active, respond at **PolleEv.com/2019tpd**

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Statewide Long-Range Transportation Plan



Project Management Discipline Workshop



Fundamentals of Project Management

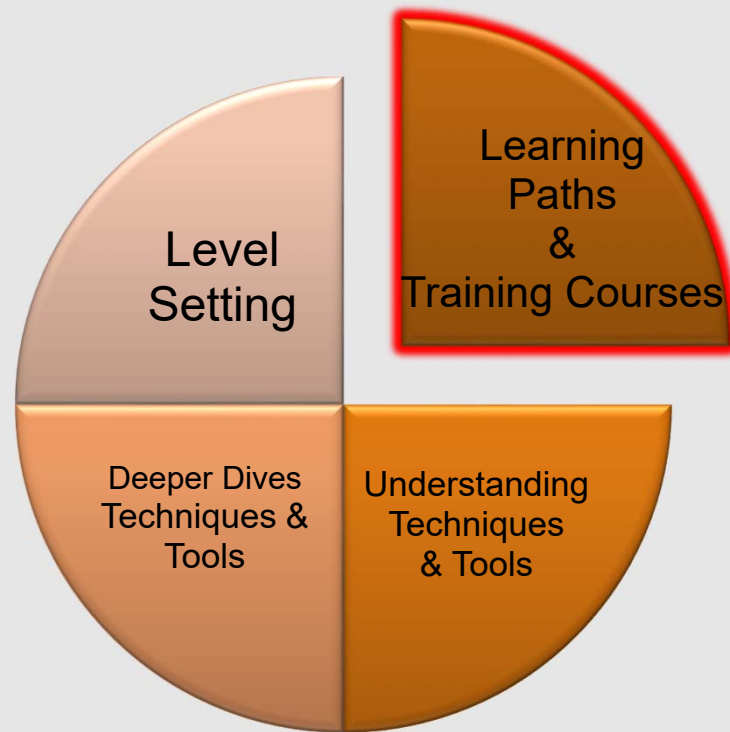


Knowledge Areas cover what a project manager needs to **know** in order to successfully manage a project and achieve desired results.

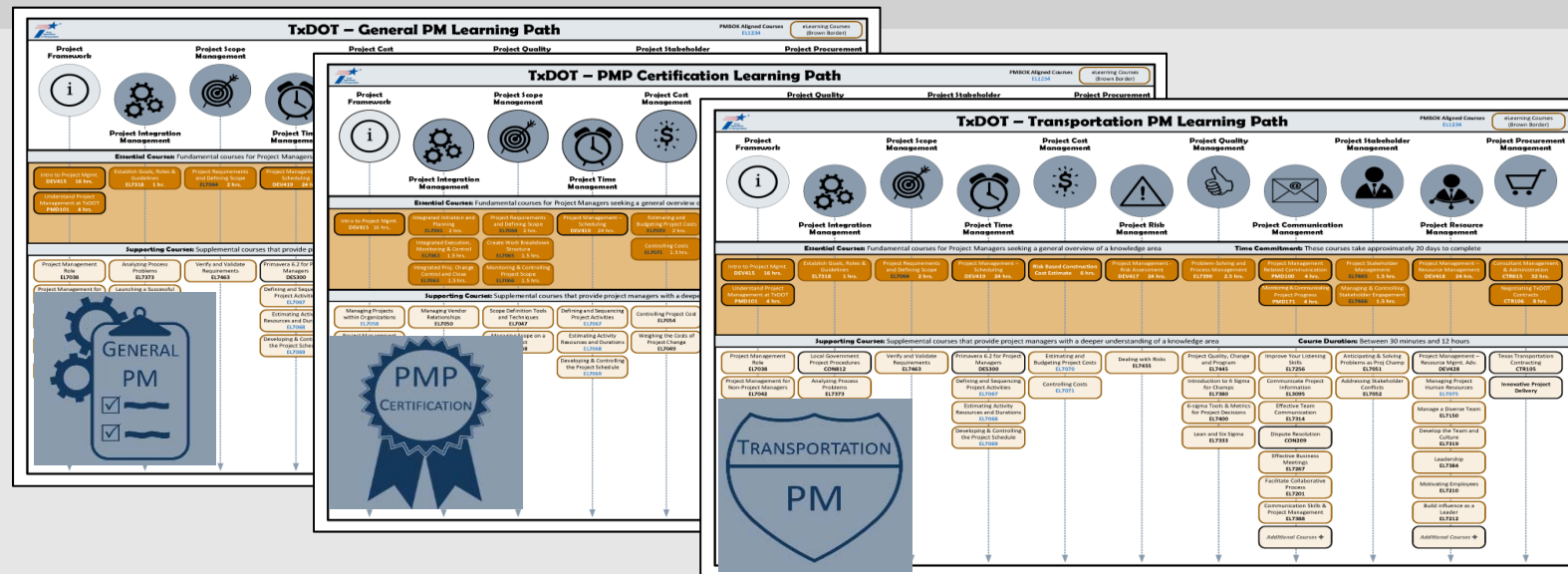
Project Process Groups cover what a project manager has to **do** in order to deliver a project successfully.

Each of the Knowledge Areas and Process Groups overlap, interact and depend on each other!

Project Management Discipline Workshop



Learning Paths for the Project Management Training Program



The PM Learning Paths provide a **suggested sequence of courses** geared towards

- General Project Managers,
- Individuals seeking PMP Certification
- and Transportation Project Managers
- Essential and Supporting Courses
- Instructor-Led and eLearning

PMD Training Courses



PROJECT MANAGEMENT TRAINING CLASSES

Project & Portfolio Management
Instructor-Led Courses



Class	Title
PMD 103	Transportation Scheduling Using P6
PMD108	Construction Contract Time Determination for Transportation Projects Using P6
PMD 120	Project Scope Management
PMD 140	Risk Based Construction Cost Estimate
PMD 141	Three-Point Estimating (Quantity, Duration, Cost)
PMD 151	Transportation Project Risk Management
PMD 300	Transportation Project Management at TxDOT

Project Management Training Courses

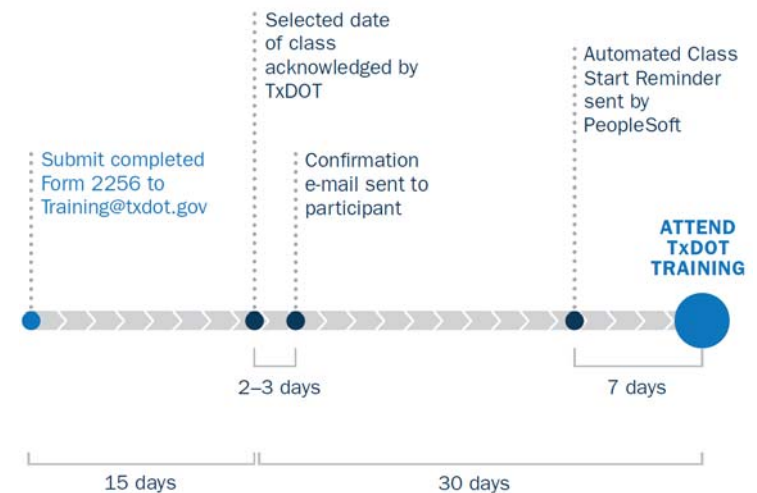


NON-TxDOT PARTICIPANT ENROLLMENT PROCESS

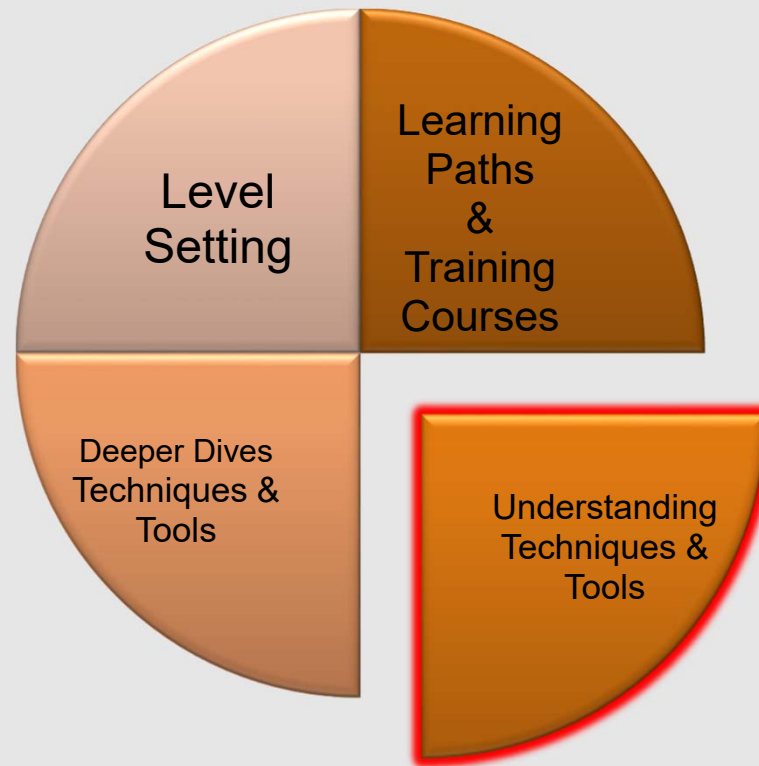
- Form 2256
- <http://txeform/lc/apps/ws/index.html#>
- Training helpline at (512) 416-2000

Who is eligible to attend?

In addition to TxDOT employees, consultants, contractors, government employees and employees of other publicly funded organizations (i.e. Traffic Safety, Public Transportation and Metropolitan Planning Organizations) are eligible to attend our project management courses. Active TxDOT employees have first priority. Vacant seats are offered on a first-come, first-serve basis.






Project Management Discipline Workshop





PPM Matrix



PM Knowledge Areas		Project Identification	Pre-Project Work	Project Execution	Verify and Update Project Plan	Project/Phase Close
		Description	This is the process to create a plan of how the project will be managed	This is process to execute the plan	This is the process to validate and/or update the plan as changes happen	This is process to finalize activities and pass on project deliverables and knowledge to the next phase
		Initiation	Planning	Executing	Monitoring & Controlling	Closing
Stakeholder Management		Processes/ Techniques	Document Stakeholder Management Plan	Document Project Stakeholders	Document Project Stakeholders	
		Tools	Project Management Plan	Stakeholder Register	Stakeholder Register	
		Training	ENV413, OPI100, PMD108, PMD151, PMD300, ROW100, ROW101	ENV413, OPI100, ROW100, ROW101	ENV413, OPI100, ROW100, ROW101	PMD300, ROW100, ROW101
Quality Management		Processes/ Techniques	Document Quality Management Plan	PM Role in QA/QC	PM Role in QA/QC	
		Tools	Project Management Plan	Review Comments Resolution	Review Comments Resolution	
		Processes/ Techniques	Schedule Quality Processes		Schedule Quality Processes	
		Tools	Acumen Fuse		Acumen Fuse	
		Training	CTR616	CTR616	CTR616	
Risk Management		Processes/ Techniques	Document Risk Management Plan	Risk Management Process	Risk Management Process	Risk Management Process
		Tools	Project Management Plan	Risk Primer Risk and Issue Register Risk Workshop (Video)	Risk and Issue Register Risk Workshop (Video)	Risk and Issue Register
		Training	PMD108 , PMD300, ROW100, ROW101	PMD151, ROW100, ROW101	PMD151, ROW100, ROW101	ROW100, ROW101

PPM Matrix



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		Initiation	Planning	Executing	Monitoring & Controlling	Closing	
Resource Management		Processes/ Techniques	Note: Project Initiation is typically not the	Document Resource Management Plan	Team Roles and Responsibilities	Team Roles and Responsibilities	
	Tools	Project Management Plan RACI Matrix PM Capacity Tool		RACI Matrix PM Capacity Tool	RACI Matrix PM Capacity Tool		
	Training	PMD140, PMD300					
Project Integration		Processes/ Techniques		Document Project Management Plan	Project Kickoff Meeting	Project Status Meetings	Project Closeout Meeting
		Tools		Project Management Plan	Kickoff Meeting Checklist	Status Meeting Checklist	Project Closeout Meeting Checklist
				Meeting Agenda and Notes	Meeting Agenda and Notes	Meeting Agenda and Notes Action Item Tracking Log	Meeting Agenda and Notes
	Processes/ Techniques			Document Program Management Plan	Project Documentation	Project Documentation	Project Documentation
	Tools	Program Management Plan		Document Control System (ProjectWise)	Document Control System (ProjectWise)	Document Control System (ProjectWise)	
		Issue Log		Issue Log	Issue Log	Issue Log	
		Lessons Learned Register		Lessons Learned Register	Lessons Learned Register	Lessons Learned Register	
		Project Documents Toolkit		Project Documents Toolkit	Project Documents Toolkit	Project Documents Toolkit	
	Training	ENV413, PMD105, PMD120		ENV413, PMD105, PMD300	ENV413, PMD105, PMD300	ENV413, PMD105, PMD300	



TOOLS

Action Item Tracking Log

Risk and Issue Register



RACI Matrix

Stakeholder Register

Kick Off Meeting Checklist

Review Comments Resolution

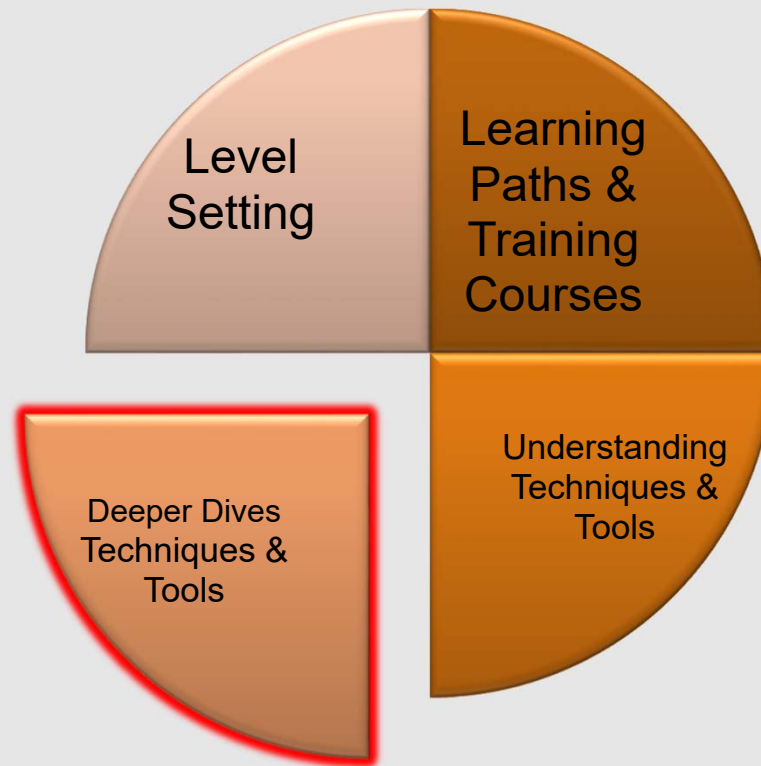
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PPM Tool - Deeper Dive



Project Management Discipline Workshop



Deeper Dives



- 1 [Action Item Tracking Log](#)
- 2 [Kick Off Meeting Checklist](#)
- 3 [RACI Matrix](#)
- 4 [Review Comments Resolution](#)
- 5 [Risk and Issue Register](#)
- 6 [Stakeholder Register](#)

[Topic 2](#)




Action Item Tracking Log

October 2019

Action Item Tracking Log




To provide a way to capture action items, communicate those action items to your team, and to track progress on those action items as the project progresses. It also serves as a permanent record of the action item after being completed .

		PM Training: Action Item Tracking Log				
#	TITLE (2-3 words about action item)	DESCRIPTION (2-3 sentences that explain action item)	ASSIGNED TO (Person responsible for completing and / or tracking action item)	BALL-IN-COURT (Individual / organization action item is with right now)	DUE DATE (When action item is due)	NEXT STEPS / STATUS (Make sure to include clear direction and movement on the action item)
Example	30% plans review	Review and provide comments on 30% plans for Johnny Jogger Expressway.	Betsy Bob	Jane Doe (Division Design)	8/22/2014 (Friday)	Jack to follow up with Jane at DES to make sure she has everything she needs, answer any questions, and see if we are on schedule with the review.
Example	Geotechnical report review	Identify someone to review geotechnical report. Anticipate receiving report first week of September. (This is a critical path item. Review comments will be due back to consultant within 30 days.)	JJ Talker	PDQ Consulting, Inc.	8/15/2014 (Friday)	Work with Bob to identify who can review. Follow up with that person to make sure they know this is coming and understand the urgency.
1						
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Action Item Tracking Log



TITLE
(2-3 words
about action
item)



PM Training: Action Item Tracking Log

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Action Item Tracking Log



DESCRIPTION

(2-3 sentences that explain action item)



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Action Item Tracking Log



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(Person responsible
for completing and /
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Action Item Tracking Log




BALL-IN-COURT
(Individual / organization action item is with right now)

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Action Item Tracking Log



DUE DATE
(When action item is due)



PM Training: Action Item Tracking Log

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Action Item Tracking Log



NEXT STEPS / STATUS

(Make sure to include clear direction and movement on the action item)



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Questions & Discussion



[Deeper Dive List](#)



Kick Off Meeting Checklist

October 2019



Conduct a Kick Off Meeting at the start of each phase —

- **Planning and Environmental**
- **Design**
- **Construction**

Kick Off Meeting Checklist



PREPARATION CHECKLIST

*Timeframes provided as guidance for **low** and **medium** rigor projects—some low rigor projects may only need 1-2 days for prep
High rigor projects may require more than 2 weeks for prep*

10 Days Before Meeting

- ☐ Develop project schedule
- ☐ Identify critical path and major milestones
- ☐ Develop organization (org) chart
- ☐ Confirm org chart with supervisor
- ☐ Identify teleconference information
- ☐ Reserve conference room
- ☐ Send meeting invitation
- ☐ Prepare draft RACI matrix
- ☐ Review RACI matrix with supervisor
- ☐ Draft agenda
- ☐ Obtain / create Action Item Tracking Log and Issue Escalation Log

1 to 5 Days Before Meeting

- ☐ Print agendas and sign-in sheet
- ☐ Gather all materials
- ☐ Review who has accepted or declined

5 to 10 Days Before Meeting

- ☐ Obtain and print maps for project overview
- ☐ Identify available budget / programmed amount
- ☐ Obtain latest cost estimate (if applicable)
- ☐ Review agenda and track down any other items that need to be reviewed or prepared before the meeting
- ☐ Make sure everyone assigned to present an agenda item is aware of their role and has what they need
- ☐ Obtain Project Management Plan and any other project documents created during previous phase
- ☐ To ensure proper hand-off between project phases, meet with prior project manager to discuss existing:
 - Risks and issues
 - Commitments
 - Project documents

Day of Meeting

- ☐ Set up meeting room 20 minutes before meeting starts

Kick Off Meeting Checklist



INVITATION CHECKLIST – PROJECT TEAM AND STAKEHOLDERS

Potential participants to include in kickoff meeting — review invitation list with supervisor

- Support Staff
- Area Engineer
- District Design
- Advanced Project Development
- Environmental
- ROW
- Others as needed

All Projects

- ☐ Support staff
- ☐ Area Engineer
- ☐ Representative from District Design
- ☐ Representative from Advanced Planning and Design

High Rigor Projects

- ☐ ENV, Design Division, ROW, etc.
- ☐ Other offices
- ☐ District Engineer
- ☐ External stakeholders
- ☐ Local, State, and Federal Agencies

Kick Off Meeting Checklist



AGENDA

Potential topics to present / discuss during kickoff meeting

Agenda items and timing are provided as guidance and may vary per project — try to keep meeting to 1 hour

- Potential topics to present & discuss during kick off meeting are provided as general guidance
- Suggested durations are also listed

- **Introductions** (~5 minutes) – Each person provide name and role on the project
- **Sign-in Sheet** (~1 minute) – Explain sign-in sheet and begin passing it around
- **Project Overview** (~10 minutes) – Go through project as you understand it
 - Limits / area of study – Map of project
 - Planning and Environmental: High level / regional map
 - Design: Latest roll plot or schematic
 - Construction: Bid plans
 - Goals and objectives – Not to be confused with purpose and need
 - Planning and Environmental goal example: Evaluating transportation improvements along Johnny Jogger's Expressway
 - Design / Construction goal example: Widening Johnny Jogger's Expressway from 4 to 6 lanes
 - Typical section – To the extent known, depending on project phase
- **Budget and Costs** (~5 minutes)
 - Programmed amount / available funds
 - Latest cost estimate (if applicable)
- **Organization Chart** (~5 minutes)
 - Chart overview
 - Contact information – Confirm sign-in sheet is complete
 - Communication protocols
 - RACI Matrix – Distribute and review, make updates, and answer questions on responsibilities
- **Schedule** (~5 minutes)
 - Major milestones
 - Long-lead items or other critical path items
- **Document Control Protocols** (~5 minutes) – Quick review, note any special considerations
- **Issues and Risks** (~15 minutes) – Consider having previous project manager at kickoff, to report on this agenda item
 - Issues – Review existing issues and include relevant correspondence and key audiences involved
 - Definition: Events that already happened and are actively being managed
 - Risks – Review existing risks
 - Definition: Events that could happen and are actively being mitigated
 - Risk Workshop – For high rigor projects, schedule workshop and identify attendees; for low to medium rigor projects, consider workshop and discuss with supervisor and Field Agent
 - Commitments – Review known commitments
- **Action Item Recap** (~5 minutes) – Review action items captured during meeting, and ensure each has a clear description, assigned team member, and deadline
- **Status Meeting** (~1 minute) – Explain you will be scheduling a regular / recurring status meeting and ask if anyone has schedule constraints on specific days or times
- **Wrap Up and Close** (~5 minutes) – Allow time for attendees to bring up any remaining comments, and let attendees know you will send out meeting minutes and applicable documents as soon as possible

Kick Off Meeting Checklist



FOLLOW UP CHECKLIST

Items to address after kickoff meeting

- Update Action Item Tracking Log
- Complete Meeting Agenda and Notes
- Distribute these items to project team after Kick-off Meeting
- Schedule regular project status meetings using recurring invite

Appointment Recurrence

Appointment time

Start: 10:00 AM
End: 10:30 AM
Duration: 30 minutes



Recurrence pattern

☐ Daily
☐ Weekly
☒ Monthly
☐ Yearly

☐ Day 21 of every 1 month(s)
☒ The first Monday of every 1 month(s)

Range of recurrence

Start: Mon 10/21/2019
☒ No end date
☐ End after: 10 occurrences
☐ End by: Mon 8/3/2020

OK

Cancel

Remove Recurrence

Questions & Discussion



[Deeper Dive List](#)



RACI Matrix

October 2019

RACI Matrix



- **Responsible** – The doers. They get the work done.



- **Accountable** – The buck stops here. This single person is ultimately answerable for the task.



- **Consulted** – People consulted typically are subject matter experts, whose advice is sought.



- **Informed** – Those that need to know. These people are kept aware of what is going on.

RACI Matrix



Task Management

- A RACI Chart can be used to manage a task or tasks.

Project Management

- A RACI Chart can be used to manage related/organized tasks to complete a project.

Perform 'As Is' Analysis

- A RACI Chart can be used to evaluate and diagnose problems in tasks, projects, teams, or other situations.

Perform 'To Be' Design

- A RACI Chart can be used to create a what-if analysis for different situations that meet the needs of the desired 'To Be' situation.

RACI Charting

Note: Responsibility Charting is a way of clarifying relationships pertaining to functional roles, participation expectation assigned to functional roles, and/or actions needed to deliver a product or service

RACI Matrix



	Project Manager				Hazmat Database Search Service				District Environmental Coordinator				Design Engineer				ROW Coordinator				Environmental Assessor/Writer				Area Engineer			
	R	A	C	I	R	A	C	I	R	A	C	I	R	A	C	I	R	A	C	I	R	A	C	I	R	A	C	I
Tasks																												
Perform Background Search																												
Perform Site Assessment at Location																												
Analyze Site Data																												
Produce EA Report & Recommendations																												

Step 1: List Roles to accomplish the task in the appropriate columns

Step 2: List all the task to needed in the appropriate rows

RACI Matrix



Tasks	Project Manager				Hazmat Database Search Service				District Environmental Coordinator				Design Engineer				ROW Coordinator				Environmental Assessor/Writer				Area Engineer			
	R	A	C	I	R	A	C	I	R	A	C	I	R	A	C	I	R	A	C	I	R	A	C	I	R	A	C	I
Perform Background Search		A			R							I				I				I				I				I
Perform Site Assessment at Location		A					C					I				I				I	R							I
Analyze Site Data		A					C					I				I				I	R							I
Produce EA Report &		A					C					I				I				I	R							I

Legend

- R Responsible** – The person who is assigned to do the work .
- A Accountable** – The person who has ultimate ownership for the completion of the task. This person delegates work to those responsible for achieving the task.
- C Consulted** – The person who must be consulted before a decision or action is taken. This person is typically a subject matter expert who has two-way communication with the person responsible.
- I Informed** – The person who must be informed that a decision or action has been taken. This person is kept up-to-date on progress and completion of a task or deliverable.

Step 3: Assign proper responsibilities to each role according to the Legend.

Step 4: Review with team to seek buy-in. Update as needed and communicate.

RACI Matrix



	District Engineer				TP&D Director				Environmental Coordinator				Design Engineer				ROW Coordinator				P6 Coordinator				Area Engineer			
	R	A	C	I	R	A	C	I	R	A	C	I	R	A	C	I	R	A	C	I	R	A	C	I	R	A	C	I
Advanced Planning																												
Define Scope/Project Definition				I		A					C		R					C						I				C
Route and Toll Studies				I		A					C		R					C						I				C
Schematic Design				I		A					C		R					C						I				C
Funding		A				R						I				I			C		I							C
Environmental																												
NEPA Clearance				I		A					R				C			C						I				I
Clearance for Letting				I		A					R				C				I					I				C
Permits and Commitments/Mitigation				I		A					R				C				I					I				C
PS&E																												
Data Collection				I		A					C		R						I					I				I
Roadway and Structural Design				I		A						I	R						I					I				C
Traffic Operations				I		A						I	R						I					I				C
Letting																												
Final Review				I		A		I			C				C			C						I				I
Processing				I		A		I				I				I			I					I				I
Construction																												
Construction				I				I							C	I									I	R		
Management																												
Project Management (Scope, Risk, Schedule, etc.)	R		C			A	C			R		C		R		C		R		C					I	R		C

Legend

R

Responsible – The person who is assigned to do the work .

A

Accountable – The person who has ultimate ownership for the completion of the task. This person delegates work to those responsible for achieving the task.

C

Consulted – The person who must be consulted before a decision or action is taken. This person is typically a subject matter expert who has two-way communication with the person responsible.

I

Informed – The person who must be informed that a decision or action has been taken. This person is kept up-to-date on progress and completion of a task or deliverable.



[RACI Analysis - A 3-Minute Crash Course \(3 min\)](#)

[RACI explained: it's simple yet powerful \(5 min\)](#)



Questions & Discussion



[Deeper Dive List](#)



Review Comments Resolution



October 2019

Review Comments Resolution



Comment Resolution form is used to track the comments as given on the said project or drawings by Project Reviewers and Project Manager, its response by the Project Manager and final resolution about what needs to be done.

Review Comment Resolution Form

Project Name (ie:CCSJ)	XXXX-XX-XXX
Deliverable Owner	Project Manager
TxDOT District/ Division	D/D Name

FIELDS TO BE FILLED IN BY REVIEWER				FIELDS TO BE FILLED IN BY COMMENT OWNER		
Document Name	Submittal Phase	Reviewer Name	Reviewer Comment	Comment Owner	Action	Response
Title Sheet	30%	J. Doe	Scale and north arrow not shown	PM	Pending	
Bridge Layout	30%	BRG- J. Doe	Use bridge approach standard for asphalt pavement	PM	Pending	

Review Comments Resolution



- Project Information
 - CCSJ
 - Project Manager (PM)
 - TxDOT Division/District
- Fields to be filled in by Reviewer
 - Document Name
 - Submittal Phase or Plan Sheet Number
 - Reviewer Name
 - Reviewer Comment
- Fields to be filled in by Comment Owner
 - Comment Owner
 - Action
 - Response

STATE OF TEXAS

DEPARTMENT OF TRANSPORTATION

PLANS OF PROPOSED STATE HIGHWAY IMPROVEMENT

STATE PROJECT NUMBER
RM 1623
CSJ 1534-02-008

NET LENGTH OF PROJECT = 34,145.10 FEET + 6.467 MILES
 HIGHWAY = 34,024.45 FEET + 6.444 MILES
 BRIDGE = 120.37 FEET + 0.023 MILES

GILLESPIE COUNTY

LENGTH FROM US 290 TO BLANCO COUNTY LINE
FOR THE CONSTRUCTION OF GUARDRAIL, SAFETY TREATMENT
OBJECTS, PROFILE EXISTING MARKINGS, PROVIDE ADDITIONAL
PAVED SHOULDER WIDTH

SECTION PROJECT
 CSJ 1534-02-008
 STA 10+00.00
 TO STA 14+00.00
 PLAN SHEET #1

60% SUBMITTAL

INTERIM REVIEW ONLY
 FOR THE DESIGN OF GUARDRAILS,
 PROFILE, BRIDGE, AND SIGNAGE.
 P.E. REVIEW NO. 11889
 DATE 8-22-2018

LOCATION MAP NOT TO SCALE

EXISTING ROAD
 GUARDRAIL NOISE
 EXISTING ROAD

END PROJECT
 CSJ 1534-02-008
 STA 14+00.00
 PLAN SHEET #2

DATE	BY	CHK	APP	REV
12/15/17	12/15/17	12/15/17	12/15/17	12/15/17
DESIGNED	CHECKED	APPROVED	DESIGNED	APPROVED

DESIGN SPEED
 DESIGN SPEED
 DESIGN SPEED
 A.D.T.

FINAL PLANS

DATE OF LETTERS: _____
 DATE WORK BEGAN: _____
 DATE WORK COMPLETED AND ACCEPTED: _____
 FINAL CONTRACT COST: \$ _____
 CONTRACTOR: _____
 LIST OF APPROVED CHANGE ORDERS: _____

I CERTIFY THAT THESE PROJECT
 AND CONTRACTS TO BE CONSTRUCTED
 COMPLY WITH THE FINAL DESIGN
 PLANS AND SPECIFICATIONS.

 AGENCY MANAGER P.E. DATE _____

CORRECT:

RECOMMENDED
 FOR LETTER:

WFO (S&M, CIVIL, FIVE PER CENT, F-1204)

Review Comment Resolution Form

69



Large Group Reviews



Document	PM Training Pamphlet
TxDOT Division	TPD-PPM
PPM Training Team	Ben

Draft PM Training Pamphlet Review Comment Resolution

FIELDS TO BE FILLED IN BY REVIEWER					FIELDS TO BE FILLED IN BY OWNER	
PDF Page Number	Submittal Phase	Reviewer Name	Reviewer Comment	Comment Owner	Action	Response
3	Draft	Darren	Add the S to task- Anyone who leads projects or supporting tasks	Ben	Complete	Communicated to Creative Services to update
3	Draft	Nicole	Bullet point under what will I learn "Create and edit a project schedule....."	Ben	Complete	Communicated to Creative Services to update
5	Draft	Darren	Consider adding a bullet for PMD108- What will I learn - Understand how calendars reflect anticipated working days, holidays and weather days.	Ben	Complete	Communicated to Creative Services to update
6	Draft	Nicole	Suggest on "Target Audience add supporting planning staff"	Ben	Complete	Communicated to Creative Services to update
6	Draft	Nicole	" Project Scope Management" we could call out and include planning staff	Ben	Complete	Communicated to Creative Services to update
7	Draft	Nicole	"Risk Base Construction Estimating" we should maybe include and call out Project Estimator	Ben	Complete	Communicated to Creative Services to update
9	Draft	Darren	Remove the S from risks- How to develop transportation project risk responses	Ben	Complete	Communicated to Creative Services to update
10	Draft	Darren	Change Book to Body- Project Management Body of Knowledge (PMBOK)	Ben	Complete	Communicated to Creative Services to update



Work Authorization Negotiations

CCSJ		1534-02-008		LOE Review Comment Resolution Form			
Design Project Manager (PM)		Darren McDaniel					
Construction Manager							
FIELDS TO BE FILLED IN BY REVIEWER						FIELDS TO BE FILLED IN BY PROJECT MANAGER(PM)	
Sheet Number or Document Name	Submittal Phase	Reviewer Name	Reviewer Section	TxDOT Response (01/14/19)	PM Action	PM Response	
Environmental Studies RM 1623	LOE	PPM	FC 120.1 and FC 120.2	Consider reducing the number of hours for the EPIC Sheets and Environmental Study review as most of the environmental issues will be handled by District staff.	Agree	EPIC sheet reduced from 19 hours to 7 hours. Environmental Study review reduced from 7 hours to 2 hours.	
Roadway Design RM 1623	LOE	PPM	FC 160.1	Please clarify that the design will be performed using Open Roads 3D as opposed to Geopak.	Clarification provided	Design will be in Opens Roads 3D, Scope under FC160.1 clarifies OpenRoads 3D.	
Roadway Design RM 1623	LOE	PPM	FC 160.1	Please provide clarification on the tasks that both the Senior Engineer & Project Engineer will be doing to calculate roadway centerlines using Open Roads 3D as they have the same number of hours under this task. Is there duplicate effort here?	Agree	Reviewed hours for Senior and Project Engineer, reduced 12 hours.	
Roadway Design RM 1623	LOE	PPM	FC 160.1	Please provide clarification on the tasks that both the Engineer-in-training & Senior Engineer Tech will be doing to calculate roadway centerlines using Open Roads 3D as they have the same number of hours under this task. Is there duplicate effort here?	Agree (some duplication, removed)	The hours were split between EIT and Senior Tech to share the effort of mainline pavements and cross streets starting at opposite ends and meeting in the middle. Reviewed hours and reduced 20 hours.	
Roadway Design RM 1623	LOE	PPM	FC 160.1	Pavement Edges for all improvements - The hours for this task are high. Please provide clarification why there is a need for 87 hours with 6 individuals. What will these individuals be doing, what will be their roles in this task?	Agree (reduced effort and moved hours to less individuals)	Hours adjusted (reduced senior engineer 6 hours, removed project engineer 4 hours, removed senior engineer tech 20 hours, added 8 hours to senior cadd operator) Task hours from 87 reduced to 65 with 4 individuals.	



Considerations

- Best Practices to document comments and resolutions.
- Format may vary around the State.

Questions & Discussion



[Deeper Dive List](#)



Risk and Issue Register

October 2019

Risk and Issue Register



The Risk and Issue Register is a comprehensive tool utilized to document and manage project uncertainties, similar to how a schedule is used for meeting milestones or a cost estimate is used to ensure the project stays within budget.

Risk and Issue Register



Step 1. Identify and discuss potential project risks.

Step 2. Analyze the probability, impact and severity of the risk and prioritize.

Step 3. Develop response and contingency plans.
Identify individual risk owners.

Step 4. Monitor and control status of risk.

Risk and Issue Register



Step 1: Risk Identification

#	Type	Category	Phase	Opportunity / Threat	Risk / Issue	Risk Name	Detailed Description	Trigger(s)
1	Project	Environmental_Hydraulics	Pre-Procurement	Threat	Risk	Archeological Discovery	If sites of archeological significance are discovered, then environmental document could be delayed.	Archeological discoveries during environmental assessment

Risk and Issue Register



Step 2: Risk Assessment

Rank			Cost Impact (\$M)					Schedule Impact (Weeks)			
Probability (1 - 5)	Consequence (1-5)	Severity (Priority)	Probability (%)	Minimum (@10%)	Most Likely (@50%)	Maximum (@90%)	COST IMPACT	Minimum	Most Likely	Maximum	TIME IMPACT (Weeks)
4	2	8	80%	0.5	1	2.5	0.9	6	52	104	42.4



Step 3: Risk Response

Response Category	Administration Notification	Response	Risk Owner	Contingency Plan
Accept	Yes	Follow NEPA procedures.	TxDOT ENV	Conduct environmental assessment early to avoid long delays and increased costs



Step 4: Monitor and Control

Status	Tracking Comments
Not Started	Assumes only further investigation at this point.

Questions & Discussion



[Deeper Dive List](#)



Stakeholder Register

October 2019

Stakeholder Register



A stakeholder register is a project management document which contains the information about the project's stakeholders. It identifies the people, groups, and organizations that have any kind of interest or involvement in your project. In this register, you can find their names, titles, roles, interests, power, requirements, expectations, and type of influence, etc.



STAKEHOLDER REGISTER							
Stakeholder Name (person, organization, group...)	Title & Contact Information	Department, Affiliation or Association	Role on the project	Requirements from Stakeholder	Expectations of Stakeholder	Level of Authority (Power) (Score 1 to 5, w/ 5 being greatest)	Level of Concern (Interest) (Score 1 to 5 w/ 5 being greatest)
						Select Score	Select Score

Stakeholder Register



**Stakeholder Name (person,
organization, group...)**



STAKEHOLDER REGISTER

Stakeholder Name (person, organization, group...)	Title & Contact Information	Department, Affiliation or Association	Role on the project	Requirements from Stakeholder	Expectations of Stakeholder	Level of Authority (Power) (Score 1 to 5, w/ 5 being greatest)	Level of Concern (Interest) (Score 1 to 5 w/ 5 being greatest)
						Select Score	Select Score

Stakeholder Register



**Title & Contact
Information**



STAKEHOLDER REGISTER

Stakeholder Name (person, organization, group...)	Title & Contact Information	Department, Affiliation or Association	Role on the project	Requirements from Stakeholder	Expectations of Stakeholder	Level of Authority (Power) (Score 1 to 5, w/ 5 being greatest)	Level of Concern (Interest) (Score 1 to 5 w/ 5 being greatest)
						Select Score	Select Score

Stakeholder Register



**Department, Affiliation
or Association**



STAKEHOLDER REGISTER

Stakeholder Name (person, organization, group...)	Title & Contact Information	Department, Affiliation or Association	Role on the project	Requirements from Stakeholder	Expectations of Stakeholder	Level of Authority (Power) (Score 1 to 5, w/ 5 being greatest)	Level of Concern (Interest) (Score 1 to 5 w/ 5 being greatest)
						Select Score	Select Score

Stakeholder Register



Role on the project



STAKEHOLDER REGISTER							
Stakeholder Name (person, organization, group...)	Title & Contact Information	Department, Affiliation or Association	Role on the project	Requirements from Stakeholder	Expectations of Stakeholder	Level of Authority (Power) (Score 1 to 5, w/ 5 being greatest)	Level of Concern (Interest) (Score 1 to 5 w/ 5 being greatest)
						Select Score	Select Score

Stakeholder Register



Requirements from Stakeholder



STAKEHOLDER REGISTER

Stakeholder Name (person, organization, group...)	Title & Contact Information	Department, Affiliation or Association	Role on the project	Requirements from Stakeholder	Expectations of Stakeholder	Level of Authority (Power) (Score 1 to 5, w/ 5 being greatest)	Level of Concern (Interest) (Score 1 to 5 w/ 5 being greatest)
						Select Score	Select Score

Stakeholder Register



Expectations of Stakeholder



STAKEHOLDER REGISTER							
Stakeholder Name (person, organization, group...)	Title & Contact Information	Department, Affiliation or Association	Role on the project	Requirements from Stakeholder	Expectations of Stakeholder	Level of Authority (Power) (Score 1 to 5, w/ 5 being greatest)	Level of Concern (Interest) (Score 1 to 5 w/ 5 being greatest)
						Select Score	Select Score

Stakeholder Register



Expectations of Stakeholder



STAKEHOLDER REGISTER							
Stakeholder Name (person, organization, group...)	Title & Contact Information	Department, Affiliation or Association	Role on the project	Requirements from Stakeholder	Expectations of Stakeholder	Level of Authority (Power) (Score 1 to 5, w/ 5 being greatest)	Level of Concern (Interest) (Score 1 to 5 w/ 5 being greatest)
						Select Score	Select Score

Stakeholder Register



**Level of Authority
(Power)**
(Score 1 to 5, w/ 5 being
greatest)



STAKEHOLDER REGISTER							
Stakeholder Name (person, organization, group...)	Title & Contact Information	Department, Affiliation or Association	Role on the project	Requirements from Stakeholder	Expectations of Stakeholder	Level of Authority (Power) (Score 1 to 5, w/ 5 being greatest)	Level of Concern (Interest) (Score 1 to 5 w/ 5 being greatest)
						Select Score	Select Score

Stakeholder Register



**Level of Concern
(Interest)**
(Score 1 to 5 w/ 5 being
greatest)



STAKEHOLDER REGISTER							
Stakeholder Name (person, organization, group...)	Title & Contact Information	Department, Affiliation or Association	Role on the project	Requirements from Stakeholder	Expectations of Stakeholder	Level of Authority (Power) (Score 1 to 5, w/ 5 being greatest)	Level of Concern (Interest) (Score 1 to 5 w/ 5 being greatest)
						Select Score	Select Score

Stakeholder Register



- May be sensitive (may not want to share)
- May want to include **who** may be communicating with the Stakeholder
- Internal and External Stakeholders

Questions & Discussion



[Deeper Dive List](#)



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once to join

Submit Feedback
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 **#2019TPD**

Thank You, Exhibitors!



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Program Management Perspectives

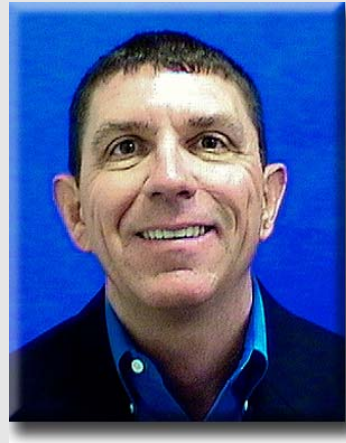
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October 2019

Panel Members



Jerry Ramos, P.E.
Ramos Consulting, LLC



Tom Benz, P.E.
Texas Department of
Transportation – Austin District



Paul Merchlewicz, P.E.
Minnesota Department of
Transportation

- [illegible]



- What are some best practices that you implement as a program manager?
- How do you define a successful transportation program or how do you achieve success at a program level? How do you translate program management to successful project delivery?
- What are some tools and resources that can help with successful program management?
- How do you manage risk from a program management level?

Panel Discussion



- What is something new and innovative that you are implementing around program management?
- From an owner perspective, what are some things that you could do to make your consultant have better support to your program?
- What measures or best practices do you like as a consultant that the owner does to help you support program management?





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Portfolio Performance Management

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Panel Members



Mildred Litchfield

Texas Department of Transportation
Unified Transportation Program and
Portfolio Performance Director



Alberta Blair

Dallas County
Director Of Public Works



Michael Haithcock

Texas Department of Transportation
Director of Transportation Planning and
Development in the Abilene District



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Project Development and Delivery Work Flows

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Safety Minute

Mission Zero, Safety Is Intentional



October 2019

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TxDOT Projects (Design, Bid, Build)

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October 2019



Project Selection:

Look at TxDOT Strategic Objectives

1. Safety
2. Preservation
3. Congestion
4. Connectivity

TxDOT also considers each project's effect on the Economy and the Environment.



Phases of Project Development

Operations & Maintenance

Project Selection

Project Initiation

Preliminary Engineering

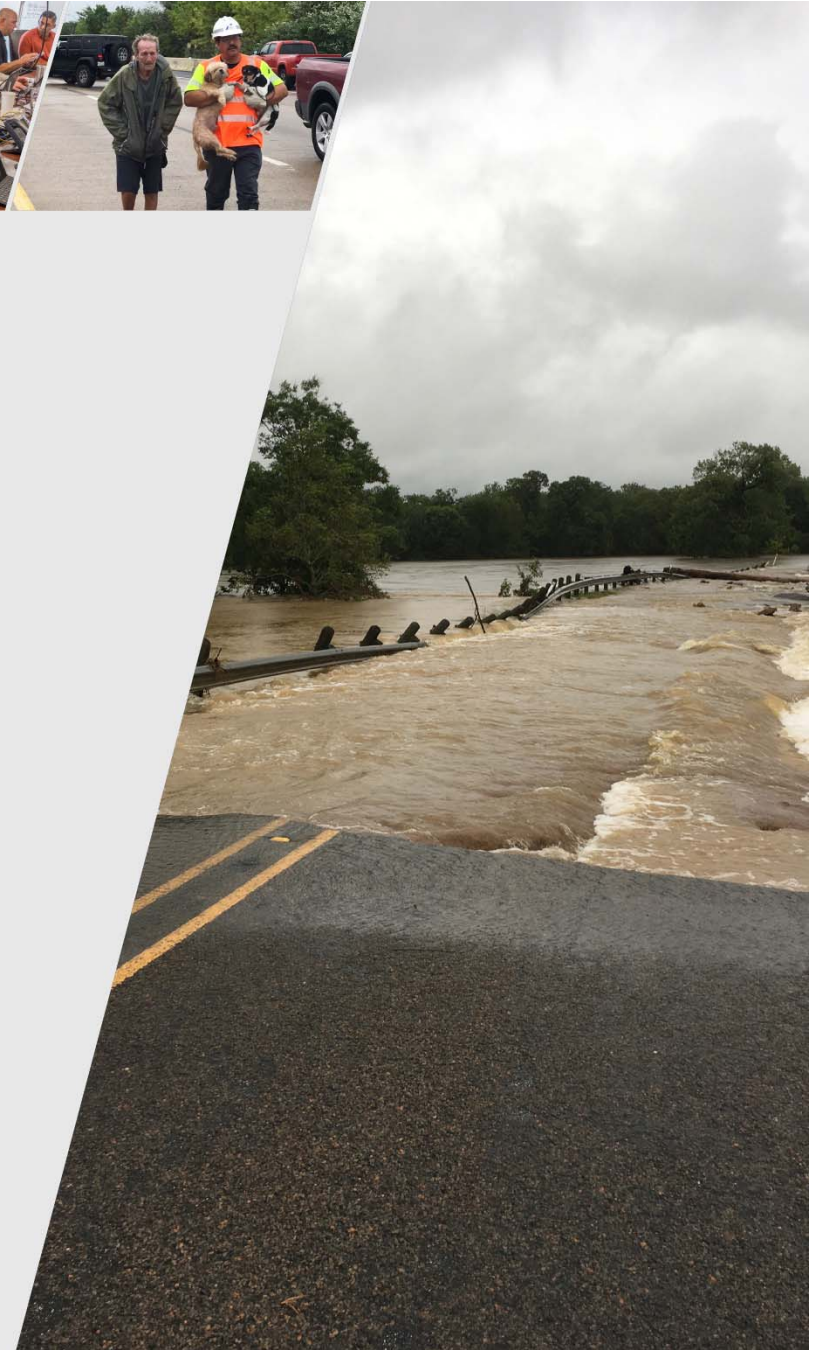
PS&E

Letting

Construction

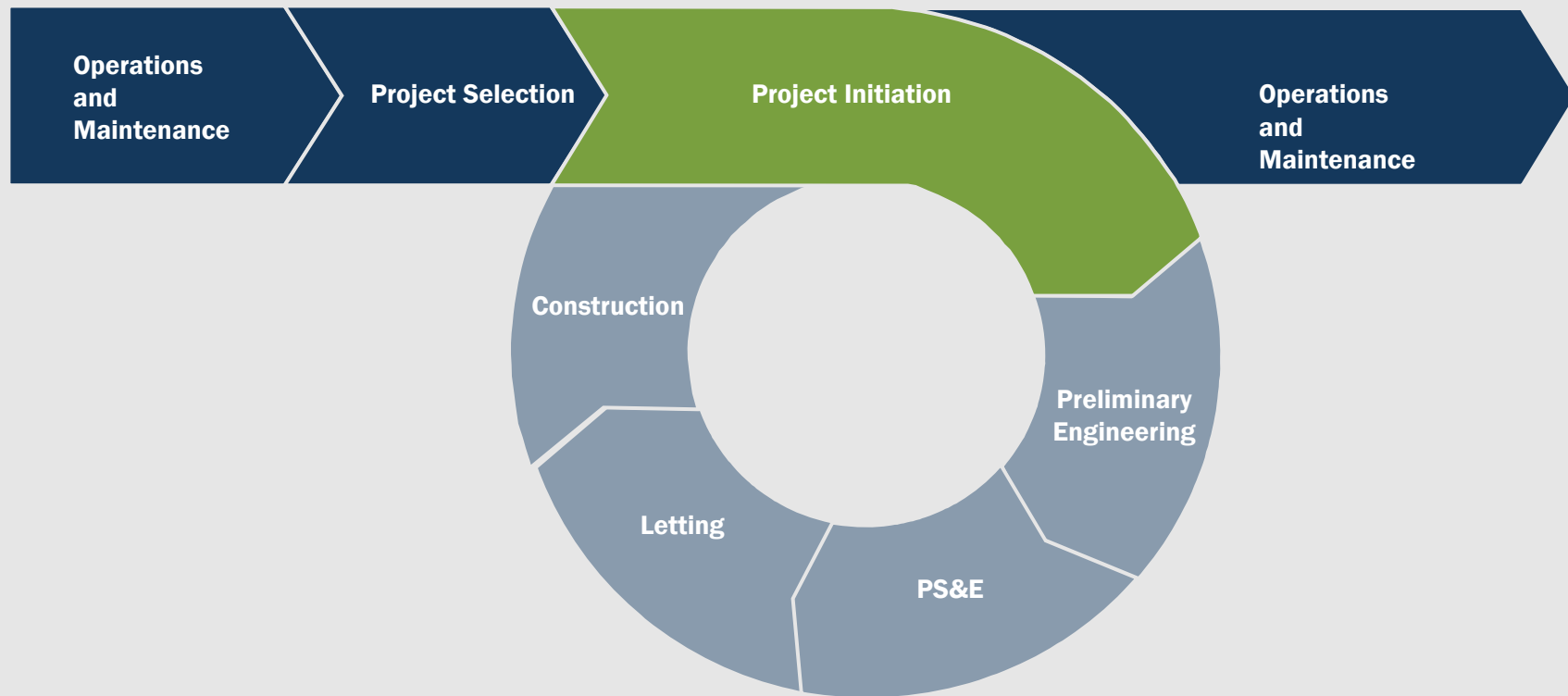
Operations & Maintenance

Project Selection



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“TxDOT CIRCLE OF LIFE”





Project Initiation/Planning

- Public
- Area Engineer, Maintenance Supervisors,
- Area Office staff, district staff, Transportation Partners, or developers
- Asset conditions
- Legislature – House Bill 20 (HB20)
- Local governments
- Possible Challenge: Public Opposition



Preliminary Engineering

- Data Collection/agreements
- Design Concept Conference
- Schematic development and approval
- ENV, ROW, UTL coordination
- Public Involvement
- Value Engineering

Parallel Processing is important during Preliminary Engineering to ensure project is delivered on time.

- Possible Challenges: Environmental sensitive areas, ROW acquisition difficulties, Complex & difficult utility relocations.



PS&E

- Finalize alignment and profiles
- Detailed Design
- ENV, ROW, UTL, and RR clearances
- PS&E assembly / design review

Some projects may be designed by Consultants.

Some projects may be reviewed by construction contractors during PS&E development.

- Possible challenges: delays in design, design errors, delays in RR Coordination and Utility Relocation





Letting

- Letter of Authority
- Project Advertisement
- Bidding Process
- Award of Contract

Important – Pre-Bid questions from Contractors.

Most projects will be low-bid and some projects will be A+B bidding.

- Possible Challenges: Low number of bidders, Addendums, Errors in Plans, Bid > 20% Eng. Est.





Construction

- Notice to proceed
- Pre-construction conference
- Supervision and inspection
- Contract Administration
- Quality assurance and testing
- Change Orders
- Project acceptance and close out

Important - Partner with contractors.

Important – Document daily work in a detailed manner.

- Possible Challenges: Weather delays, found unexpected utility conflict, errors in plans, Contractor falling behind project schedule, Contractor time claims, poor construction records





Design, Bid, Build

Most TxDOT projects are Design, Bid, Build.

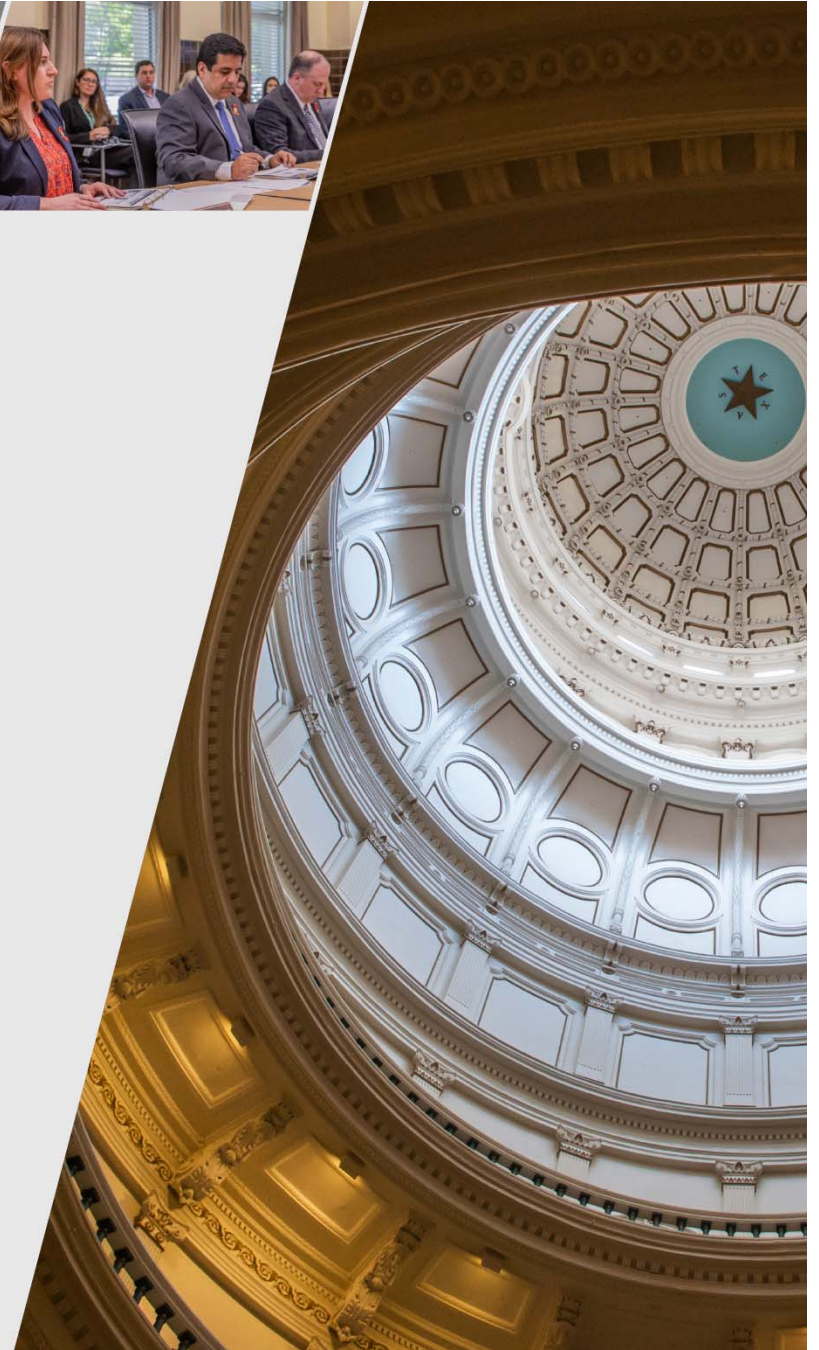
Involve Stakeholders early in Project Development.

Want to strive for accurate plans to keep project on time and on budget.

Work with Area Engineer to answer pre-bid questions in a timely manner.

Partner with Contractor.

Keep good detailed records of daily work reports.





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TxDOTCONNECT



Local Government (LG) Projects

2019 Transportation Project Delivery Conference

October 2019

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Local Government Project Definition:

- *At Least one Phase of Project Development is Managed by a Local Government (LG) Agency for Which it is Being Reimbursed with Federal (FHWA) and/or State (TxDOT) Funding or*
- *A Totally Locally Funded Project Managed by the LG on the State Highway System*

Local Process:

- LG Identifies Problem and Develops Project
- Local Funding Source(s) Identified & Used
- Contract Executed Between LG and Consultant

Federal Process:

- Project Qualifies as LG Project
- Advanced Funding Agreement (AFA) – Also Referred to as a Local Project Advance Funding Agreement (LPAFA) is Executed Between TxDOT and LG
- LG Representatives Need to Attend Training
- LG Risk Assessment is Completed



Challenge:

- Executing the AFA

Solutions:

1. Submit the Project Level Oversight Level Special Approval Form & Location Map ASAP
2. Schedule in City Council or Commissioners Court Agenda
3. Provide Initial Payment as Determined by AFA

Schedule Impacts:

- Variable (0 – 12 Months)



Local Process:

- LG Milestone Delivery
- LG Established Specs/Design Criteria

Federal Process:

- Design Concept Conference (DCC) & Design Summary Report (DSR)
- District Design Review Team (DDRT) Meeting and District Safety Review Team (DSRT) Meeting at 30% & 60% Milestones
- State Standard Specs/Design Criteria, LG 1-9s, etc.
- Project Development Checklist (LG Checklist)
- Typical Sections & Form 1002, Page 3 Submittal



Challenge : Completing the LG Checklist

Solutions:

1. Scope Consultants to Complete Checklist
2. Begin Completing the Checklist in Early Design Phases

Schedule Impacts: Variable (1 – 4 Months)

Challenge : Coordinating the LG and TxDOT Schedules

Solutions:

1. Provide Milestone Schedule to TxDOT
2. Submit Milestone Two Weeks Prior to TxDOT Meetings

Schedule Impacts: Minimal (1 – 2 Months)



Local Process:

- LG Coordinates Directly with Regulators
- Risk Belongs to LG
- Not Usually on Project Critical Path

Federal Process (National Environmental Policy Act [NEPA]):

- Formal Scoping Process to Determine Environmental Requirements
- Risk Belongs to TxDOT
- Public Involvement is More Rigorous
- Noise & Air Studies are Required
- More Structured Documentation
- Limits of Work vs Project Limits (Incidental Work)
- Requires Clearance Prior to ROW Acquisition and Letter of Authority (LOA)



Challenge: Obtaining ENV Clearance

Solutions:

1. Integrate Environmental Process into Overall Project Development
2. Provide a Detailed Project Description
3. ENV and PM Coordinate Project Improvements

Schedule Impacts: Variable (2 – 18 Months)

Challenge: Public Involvement

Solutions:

1. Knowledge of the (New) Process
2. Early Communication with TxDOT ENV Specialists

Schedule Impacts: Variable (2 – 6 Months)

Challenge: ENV Study Area/Incidental Work

Solutions:

1. Establish Project Improvement Limits Early in Design
2. Include Detours, Mill & Overlays, Approaches into/out of Project Limits

Schedule Impacts: Variable (1 – 4 Months)



Local Process:

- Coordination is Responsibility of the LG
- Most LGs Allow Relocations Under Pavement
- Joint-Bid and Build Underground Facilities

Federal Process:

- Buy America
- Not Eligible for Federal Reimbursement
- Requires Certification in Final PS&E Documents



Challenge: Letting a “Clean Project”

Solutions:

1. Design Underground Improvements Early
2. Share Design Files with Utilities
3. Stake ROW for Overhead Utilities
4. Verify Utility Relocation Plans

Schedule Impacts: Could be Substantial (Up to 12 Months)

Challenge : Keeping the Utilities Engaged

Solutions:

1. “Old-Fashioned Badgering”
2. Don’t Prioritize Every Project
3. Develop, Update, and Distribute a Utility Conflict Matrix

Schedule Impacts: Minimal



Local Process:

- Acquisitions Begin Almost Immediately
- Acquisitions Not Dependent on Environmental Clearance

Federal Process:

- The Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 aka Uniform Act
- Environmental Clearance Required
- Documentation – Title III Audit, Double Appraisals
- Appraisers Must be Certified
- ROW Certification Required in Final PS&E Package



Challenge: Acquiring Properties

Solutions:

1. Identify ROW Needs
2. Monitor ENV Clearance Process and Allow Time in Schedule

Schedule Impacts: Variable (6 – 12 Months)

Challenge: Performing the Title III Audit

Solutions:

1. Contact the TxDOT ROW Section for Guidance Early in the Process
2. Submit Proposal Packages to TxDOT Prior to the Property Owner(s)

Schedule Impacts: Variable (0 to 4 Months)

Challenge: Obtaining Appraisals

Solutions:

1. Hire Certified Appraisers
2. Perform Two (2) Appraisals
3. Include Cost Into Budget

Schedule Impacts: Variable (2 – 4 Months)



Local Process:

- No Additional Agreements Required for Funding
- Schedule Based on Local Advertising Procedures
- Local HUB/DBE Goals Program

Federal Process:

- Letter of Authority (LOA) & Federal Project Authorization and Agreement (FPAA)
- Letting Schedule: Approximate Three Month Duration from Final PS&E to Letting
 - Final plans to LOA Request = 14 days
 - LOA Request = 28 days
 - Advertising = 30 days (21 days minimum)
 - TxDOT Concurrence (Letting) = 14 days
- Signed Certifications and ENV Clearance
- DBE Goal Obtained from Office of Civil Rights Prior to Advertising



Challenge: Bidding the Project on Schedule

Solutions:

1. Realistic Advertising & Letting Dates
2. Milestone Deadlines
3. Complete 100% PS&E Submittal

Schedule Impacts: Variable (0 – 4 Months)



Challenge : Understanding the Federalized Process Itself

Solutions:

1. Attend Training; Use LG Toolkit, Manuals, Etc.
2. Work with Experienced Staff
3. Coordinate with TxDOT Staff and Ask Questions

Challenge : Managing the Federal Procedures, Tasks, Meetings, Etc.

Solutions:

1. Hold Project Kick-Off and Invite TxDOT/Attend Design Concept Conference
2. Include in Project Scope/Fee
3. Incorporate into the Project Schedule

Challenge : Meeting the Letting Schedule

Solutions:

1. Early Assessment of Time Constraints
2. Identify Ways to Reduce Durations or Eliminate Milestones
3. **Do Not Change the Project Improvements , Limits, Etc.**



Thanks to:

Bexar County

City of New Braunfels

City of San Antonio

City of Seguin

City of Universal City

San Antonio River Authority

TxDOT SAT District Staff



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TxDOT Design-Build

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Answer depends on:

- How complex is the project?
- Who is in the best position to manage and control a given risk?
- Alternative Delivery Support Tool
 - assist the Districts in determining a project's suitability for alternative delivery



D-B-B vs D-B: a Comparison



	Design-Bid-Build	Design-Build
Contracting	<ul style="list-style-type: none">▪ TxDOT staff designs or contracts with a consultant to design project.▪ TxDOT advertises design to contractors for bids.	<ul style="list-style-type: none">▪ TxDOT contracts with a contractor to perform both design and construction.▪ Contractor will contract design consultant to design project.
Delivery process	<ul style="list-style-type: none">▪ TxDOT hires design firm to deliver 100% complete design documents.▪ TxDOT solicits fixed-price bids from contractors to construct the work.	<ul style="list-style-type: none">▪ Based on preliminary design, TxDOT solicits State of Qualifications from interested proposers (contractors) to team-up to perform both design and construction work.▪ TxDOT contracts with best-valued proposer to design and construct work.
Risk	<ul style="list-style-type: none">▪ Public sector (TxDOT) carries the highest amount of project risks with this delivery type.▪ Designers and contractors bear no contractual connection with each other.▪ TxDOT has all risk associated with the completeness of the design documents.	<ul style="list-style-type: none">▪ Many risks are be transferred from TxDOT to the private sector (contractor).▪ Contractor directly responsible for contracting with design engineers to ensure completeness of design documents.▪ Contractor has most of the schedule risk to deliver project within contracted timeline.

Risk Allocation¹



Risk Type	Traditional Project Delivery Design ► Bid ► Build	Alternative Project Delivery Design ► Build
Environmental approval	TxDOT	TxDOT
Financing		
Operation and maintenance		Shared between TxDOT and Contractor
Environmental compliance		
ROW acquisition ²		
Utility delays	Contractor	
Design		
Construction		Contractor
Schedule delays		

1 Actual risk assignments may vary by project.

2 Eminent domain delays retained TxDOT.

Typical project development schedule (D-B-B)



Phase	Scope Description
Planning	Existing condition and data collection, alternatives development and analysis, traffic modeling and analysis, conceptual schematic development of reasonable alternatives, geometric design of recommended alternative
Environmental clearance/ Preliminary design	Schematic development, environmental documentation, public involvement, noise analysis, utility investigations, preliminary geotechnical studies, preliminary drainage studies, hazardous materials assessment, preliminary cost estimate
Right of way (ROW) and utilities	ROW parcel survey and mapping, develop utility agreements
Plans, specifications and final cost estimate development	Roadway design, pavement design, drainage design, bridge design, signing, pavement markings & illumination designs, intelligent transportation systems design, final cost estimating, develop specifications
Process and advertise for bidding	Compile plans, specifications, final cost estimate to advertise
Construction	Materials testing, inspection, construction management

D-B-B and D-B compared



D-B-B	D-B
Planning	Planning
Environmental clearance/preliminary design	Environmental clearance/preliminary design
Right of way (ROW) and utilities	Two-step procurement: 1. Request for Qualifications 2. Request for Proposals
Plans, specifications and final cost estimate development	
Process and advertise for bidding	Design, right of way, utilities and construction
Construction	

- D-B-B and D-B
- D-B-B
- D-B



- Request for Information
 - Generate industry involvement and appetite for project
 - Used to incorporate industry input into RFQ and RFP

- Request for Qualifications (RFQ)
 - Minimum criteria potential bidders must meet to bid on work
 - Industry is evaluated on their past experience, references, and ability to deliver the project
 - Pass/Fail and Qualitative review of evaluation performed on RFQ
 - Set shortlisting by TxDOT of most qualified firms

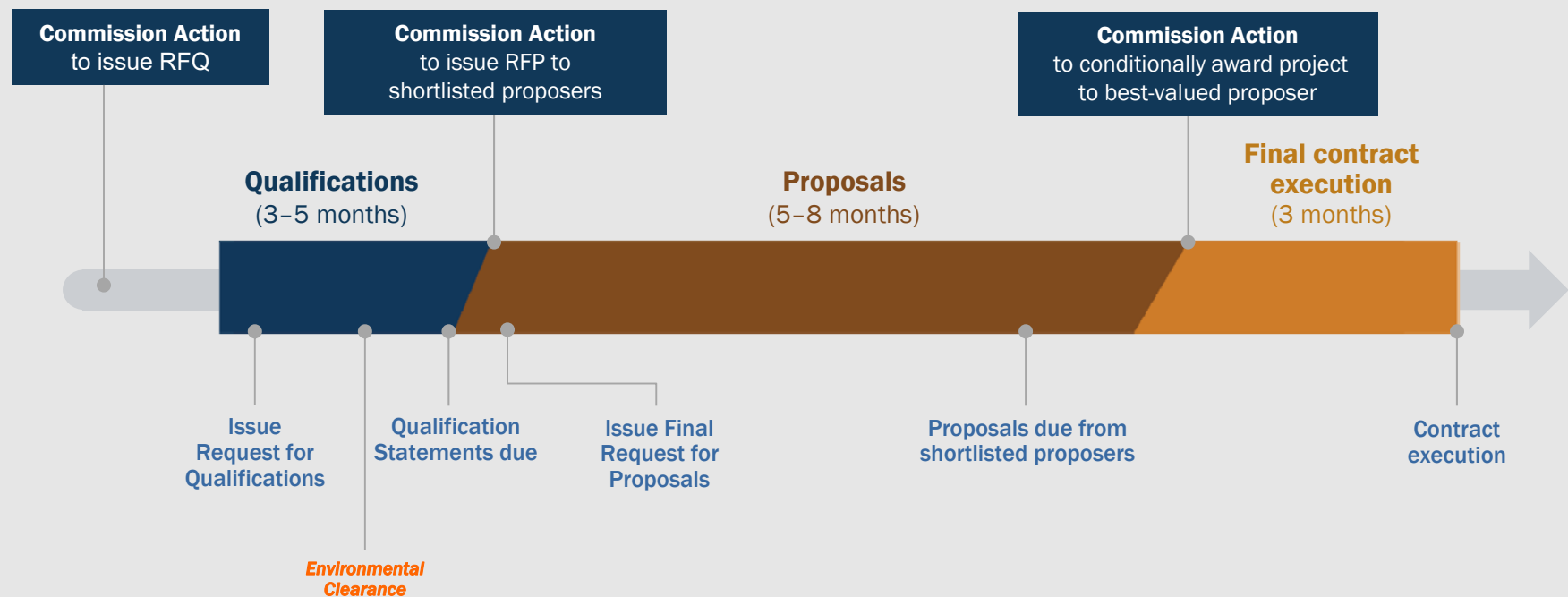


- **One-on-One Meetings**
 - Allow the proposer to discuss elements of the proposal directly with TxDOT
 - Encourage innovation and collaboration

- **Addenda**
 - Once the need to change published documents is identified, an addendum will be prepared and issued.

- **Alternative Technical Concepts (ATC)**
 - Concepts that are inconsistent with the requirements for design, construction, or capital maintenance for the Project or otherwise require a modification of the Technical Provisions
 - Contractor provides technical approach equal to or better
 - TxDOT review team of technical experts will accept or reject ATC
 - Encouraged as a means of innovation leading to better value and time savings

Design-Build: Two-step procurement overview





- Acceptance by Independent Quality Firm
- Quality Assurance Program
 - Ensures that materials and workmanship incorporated into the highway construction project are in reasonable conformance
 - Provides statewide consistency and a programmatic approach
 - Clarifies and implements the Federal requirements
- Capital Maintenance Agreement



Quality Assurance
Program for
CDA / Design-Build
Projects with a Capital
Maintenance Agreement
with Three Optional 5-Year
Terms

August 29, 2017

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Risk Assessment, Oversight Levels and AFAs

2019 Transportation Project Delivery Conference

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Local Government Project Administration

Fort Worth District –
Risk Assessment Process

October 2019



PROJECT ELEMENTS

Requirements

Local Risk Assessment

Oversight Level Special Approval

Advance Funding Agreement



October 2019

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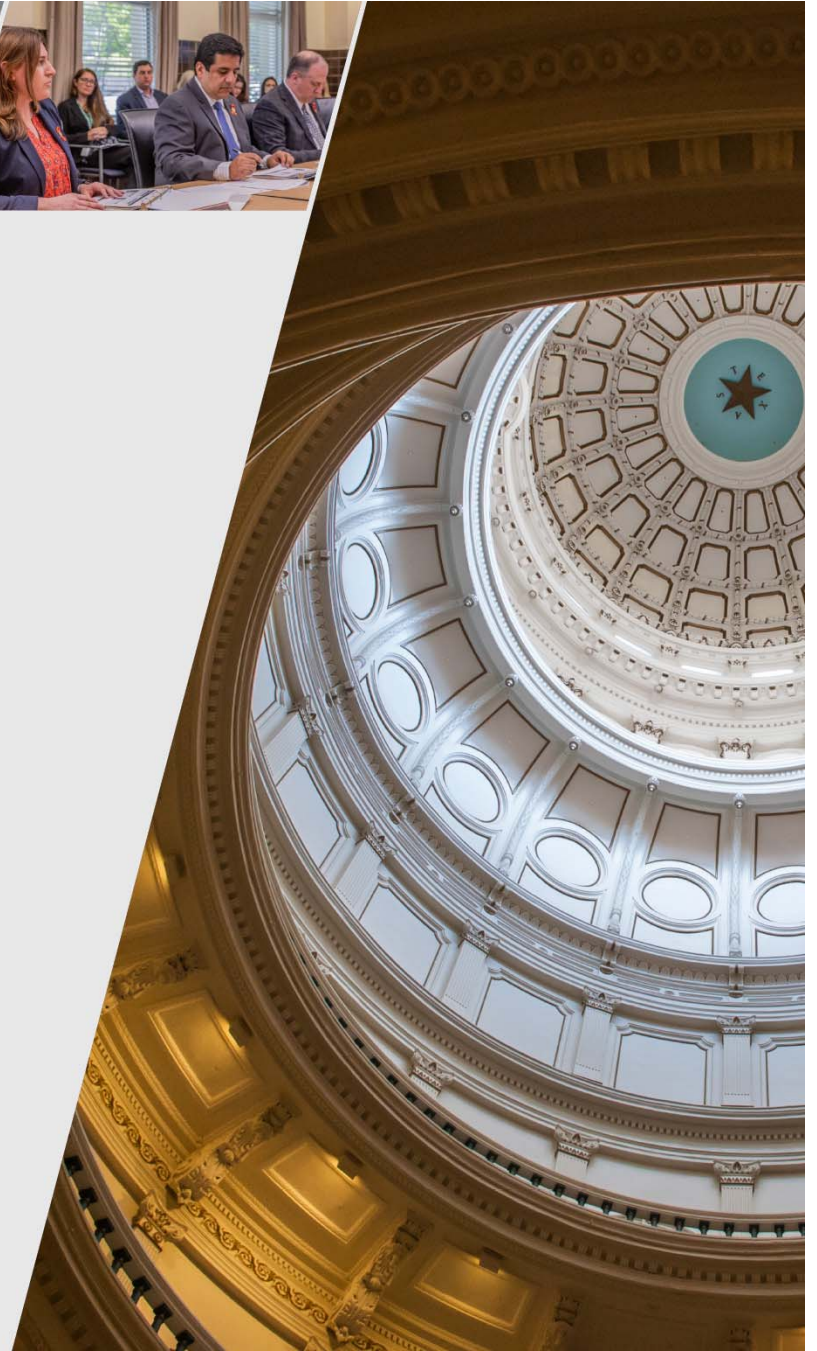
1	Requirements	5
2	Local Risk Assessment	7-10
3	Oversight Level Special Approval	12-14
4	Advance Funding Agreement	16-18



Requirements

Code of Federal Requirements

Texas Administrative Code



October 2019



- 2 CFR § 200.331

“All pass-through entities must evaluate each sub-recipient’s risk of non-compliance with Federal statutes, regulations, and the terms and conditions of the sub-award for purposes of determining the appropriate sub-recipient monitoring.” (effective Dec 2013, amended Sep 2015)

- TAC § 15.52

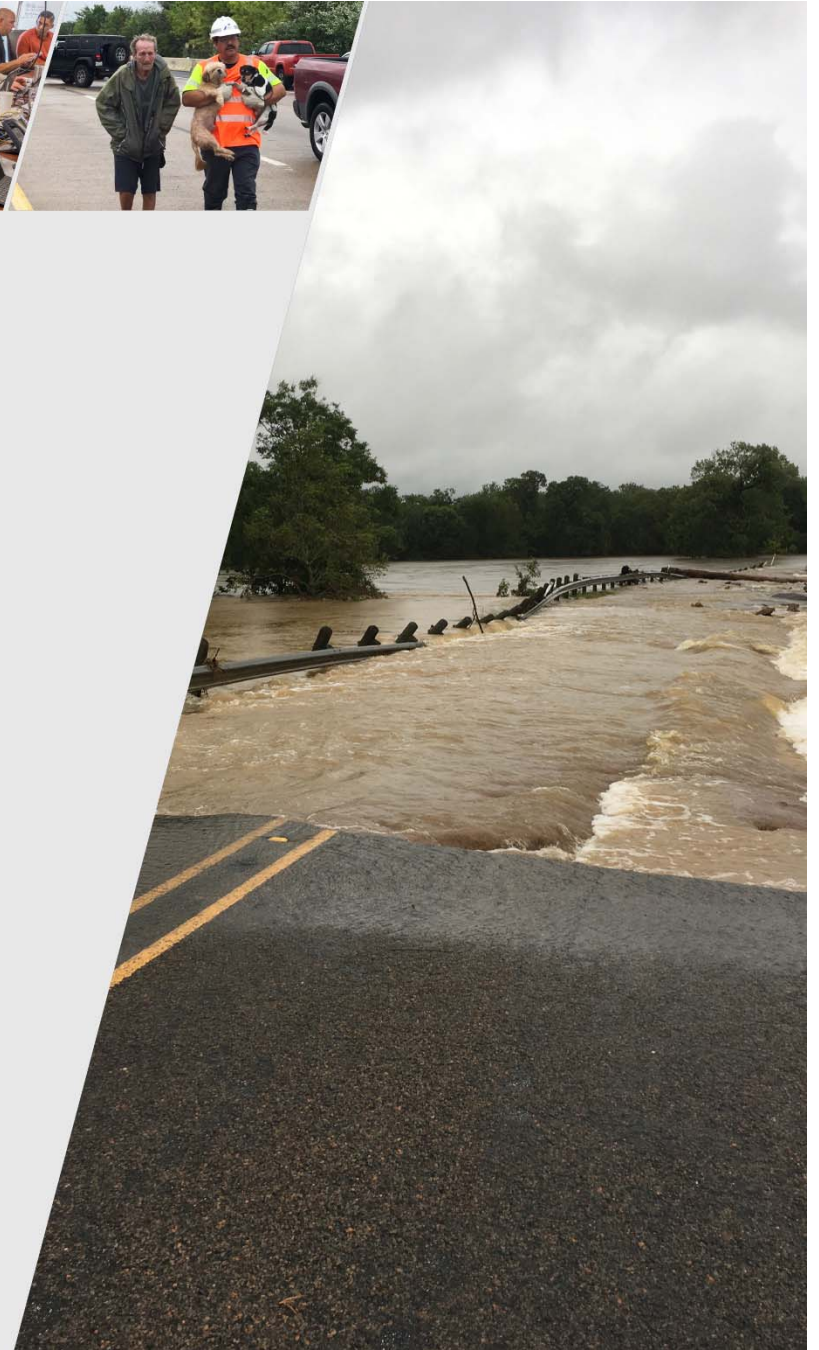
Special Approval Statement

<http://www.txdot.gov/government/programs/local-government-projects.html>



Local Risk Assessment

Risk Assessment Form
Oversight
Existing Project



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- Perform Local Government Risk Assessment
- Oversight Level Special Approval
 - Part A – Local Governments
 - Part B – TxDOT Evaluation and Special Approval
- Existing Project – TxDOT Project Update of Local Government Qualifications



- District Responsibilities
 - Schedule District Review of Individual Local Governments
 - Assemble group of individuals familiar with the Local Government Agency's capabilities
 - Preliminary Engineering
 - Environmental
 - Right of Way
 - Construction
 - Complete the risk assessment together for acknowledgement by the District Engineer
 - District Engineer may be one of the participants performing evaluation



- Grading Scale:

Low level of risk to TxDOT	A
Moderate level of risk to TxDOT	B
High level of risk to TxDOT	C
Unacceptable level of risk to TxDOT	D

- Evaluation is qualitative
 - Use professional judgement, be fair, strive for consistency
 - Grade each of 8 categories
 - Overall score is not a numerical calculation
- Include brief comments to explain each rating

Risk Assessment (Continued)



8 Criteria scores:

1. Audit
2. Project Delivery Process
3. Financial
4. Compliance
5. Communication/Responsiveness
6. Stability
7. Experience
8. Teamwork

Total Overall Risk Assessment Score:
(A, B, C, or D)

Texas Department of Transportation

LG Name: _____

LG Texas ID No. (TIN): _____

District: _____

Local Government (LG) Agency Risk Assessment

Criteria	Range of Attributes*	Risk Score	Comments/Justification for Risk Score
Audit	No findings of concern	A	
	Minor findings that are actively being addressed	B	
	Major findings being addressed or multiple minor findings	C	
	Multiple major findings	D	
Process	Well-defined process that regularly demonstrates successful results	A	
	Not well-defined process, but demonstrated success on past projects	B	
	Well-defined process that is new or has not shown consistent success	C	
	Inadequate process or no project delivery system has been provided	D	
Program Performance (with TxDOT or Similar Agency)	Consistently provide accurate and timely billings	A	
	Consistently accurate billings, not as frequently or timely as desired, or occasional inaccuracies	B	
	Occasional inaccuracies, always resolved, less frequently or timely billings than desired	C	
	Inaccurate, infrequent, or incomplete billings	D	
	Consistent compliance with thorough documentation	A	
	Minor compliance or documentation issues, promptly addressed when notified	B	
	Some compliance or documentation issues, addressed but not always promptly	C	
	Poor performance, frequently lacking documentation	D	
	Always timely, credible, and complete information	A	
	Credible and complete information, occasionally delayed	B	
	Eventually provides credible and complete information upon repeated requests	C	
	Non-responsive, inaccurate, or incomplete information	D	
	Steady, consistent, continuity of personnel in key positions over extended time	A	
	Current personnel have been in positions for a reasonable length of time	B	
	Some turnover in key positions, but culture of LG remains relatively consistent	C	
	Frequent turnover of personnel or changing positions	D	
Program Leadership	Well-equipped through education and/or training	A	
	Good basic level of experience and knowledge and commitment to further development of skills	B	
	Limited experience and knowledge but commitment to further development of skills	C	
	No relevant experience in required areas and/or no commitment to further development of skills	D	
	Consistently looking for mutually acceptable outcomes	A	
	Reasonable willingness to work with others to achieve mutually acceptable outcomes	B	
	Hesitant to agree with anything that is not clearly in best interest of LG	C	
	Solely interested in winning at expense of others	D	
Total Overall Risk Score (A, B, C, or D)			

* The descriptions of the Range of Attributes are examples only and do not necessarily apply to the LG. The comments explain the justification for the risk score.

Low level of risk to TxDOT	A
Moderate level of risk to TxDOT	B
High level of risk to TxDOT	C
Unacceptable level of risk to TxDOT	D

Recommendation: _____

Signature - Dist. Dir. of TP&D _____

Acknowledgement: _____

Signature - Dist. Dir. of Const. _____

Printed Name - Dist. Eng. _____ Date _____

Signature - Dist. Eng. _____



Oversight Level – Special Approval

Evaluate
New Projects – Form

October 2019



- TAC § 15.52 requires the Department to evaluate:
 - Previous LG experience
 - LG capability to perform or manage work following rules
 - Percentage of total project cost to be provided by local government
 - Available Department resources
 - Cost-effectiveness
 - Other considerations

Oversight Level - Special Approval (Continued)



- Ensures district/LG conversations prior to execution of AFA
 - Program requirements
 - Level of effort for management
 - Discuss strengths/weaknesses
- District evaluates level of risk and set appropriate oversight
- District re-evaluates on periodic basis
- Addresses any State Audit Findings
 - Documentation of compliance with federal requirements
- Increase probability of project success



- For use on new projects
 - LG will be performing work on SHS or will be reimbursed with federal or state funds
- Part A – LG Qualifications
 - Submitted by LG to TxDOT Project Manager
- Part B – TxDOT Evaluation of LG Qualifications
 - Review by district personnel
 - Recommendation by DE
 - Approval by Deputy Executive Director



Advance Funding Agreement

Overview Process
Project Budget



October 2019



– Process Overview

- Getting Started (once project specifics determined such as scope and current project estimated costs), drafting AFA (1-2 weeks)
- LG Review (2-3 weeks)
- TxDOT Division/Legal review (2-4 weeks)
- Signatures
 - Local (2-4 weeks)
 - TxDOT (2-3 weeks)
- TOTAL of approximately 16 weeks



- Budget page contains costs allocated based on applicable federal, state, and local funding for applicable phases of the project
 - Fixed - amounts listed are fixed until the maximum obligated amount is reached. State is normally responsible for overruns, subject to change.
 - Specified Percentage - percentage amounts until the maximum obligated amount is reached. Local Government is normally responsible for overruns.



- TxDOT determines which funding type is appropriate for the project based upon which party is managing the activity and ability to accurately estimate budgeted amount
- The Local Government is responsible for total cost of all expenditures which are not eligible for federal or state participation
- Direct State Costs (TxDOT reviews, inspections and oversight)



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TxDOTCONNECT

Project Governance

October 2019

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2	Governance Leading Practices	4
3	TxDOTCONNECT Governance	5
4	Agile Governance	6
5	Enterprise Governance	7

What is Project Governance?



- Many definitions of the term “governance” leading to confusion and ambiguity
- The goal of governance is to achieve business results
- The execution of project governance is about decision making
- Governance focuses on the interaction and intersection of four key areas:
 - Decision rights – who makes the decisions
 - Investment decision making
 - Enterprise risk management
 - Compliance and assurance

Governance Leading Practices



- **Involve senior management.** Senior business management are the decision makers, and such initiatives should encourage their input and buy-in.
- **Prioritize governance goals.** Reduce complexity, confusion, and conflict by selecting the most appropriate goals.
- **Assign ownership and accountability for project governance.** More than an individual, a select group of experienced resources should be assigned to deliver, monitor, and control any governance initiative.
- **Provide transparency.** Visibility is vital because it builds confidence and understanding of the process.
- **Learn, then adopt any redesign.** Governance is an evolutionary process. Learn from mistakes and new or improved knowledge.

TxDOTCONNECT Governance Processes

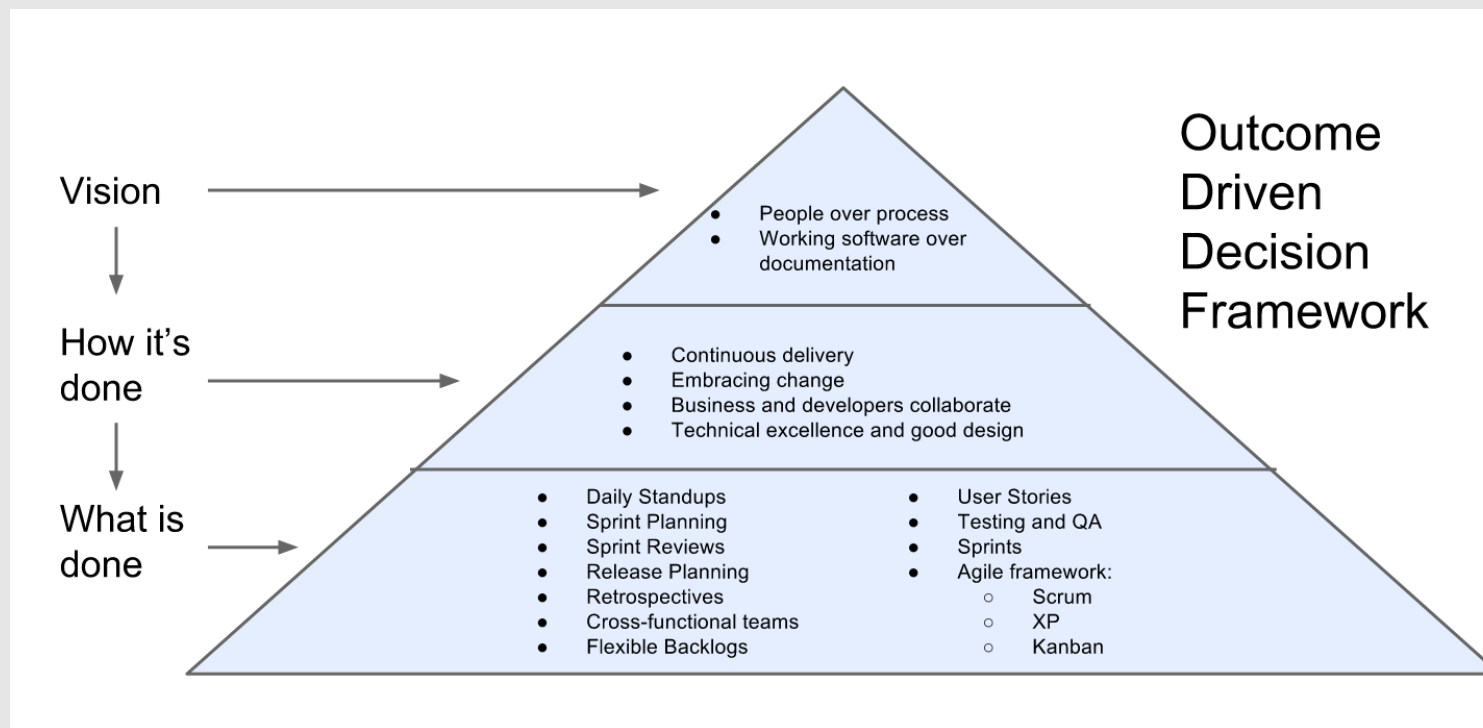


- Sponsor and Decision Making Stakeholders
 - Existing TxDOT governance bodies:
 - Executive Steering Committee, CAB, ARB, DGG, etc.
 - Project specific decision making authority
- Project RACI
- Change Control Process
- Decision Log
- Risk and Issue Management
- Integrated Workplan
- Escalation Process

Agile Governance



- All tasks and approaches to be accountable the question: Does what I'm doing achieve the vision and purpose of what I must accomplish? : Why > How > What?



Enterprise and Portfolio Governance



Information and technology-related decisions and investments are being made by a much more diverse and distributed set of business roles leading to a growth in business-led IT

Cooperative Options for Business and IT Collaboration





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Program Update

Stacey Worsham, MPPM Program Manager

TxDOTCONNECT compared to DCIS

DCIS

UPDATE MODE07/20/18PROJECT ID (P01)15:42:50ENGLISHDCIS.02A

CTL-SEC-JOB197-03-076HWY NO US 175DIST 18CNTY KAUFMAN130

BEG MILE POINT12.666END MILE POINT19.480PROJECT LENGTH MI6.814

BEG REF MARKER NUM608SUFFIXDISPLACEMENT1.666DFO19.535

END REF MARKER NUM616SUFFIXDISPLACEMENT0.386DFO26.349

LIMITS FROMVARIOUS LOCATIONS FROM DALLAS C/LTRM UPDATE FLAG S

TOFM 1390PROJ CLASS BMN

TYPE OF WORKUPGRADE BRIDGE AND APPROACH RAILINGSPEC BOOK YEAR 14

LAYMANS DESCREPLACE BRIDGE AND APPROACH RAILING

PDP CODEPL20ABATEMENT AUTH00LET SCH FY

RESP. SECTIONFUNCTIONAL CLASS3FED LETTER OF AUTH00

INFLATION %4.00DISTRICT OVER %0.00STATE LETTER OF AUTH00

LATEST EST OF CST COST1312303LOCAL GOVT NO UTP AUTHORITYD DVLP

DATE OF LATEST EST02 08 17PERF END DATE N PRES DIST EST LET DATE8 21

AUTHORIZED AMOUNT1298422TRUNK SYSYAPPROVED LET DATE00

CONTRACT CSJ019703076NHSYELSACTUAL LET DATE00

OVERSIGHT SRAIL COORD NHURR EVAC RTE YPROJ NUM NH

PROJ ANCESTORS019703925ROW CSJ:

PROJ DESCENDENTS

REMARKS

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---

LEGIS UPDT FIN EVAL EST SUM UTP STIP METR COR TPC PE MENU

PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11PF12

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Projects

Letting

Portfolio Programs

Contract

Right of Way

Assets

Save Project

Project Details

Location

Project Details

Estimated Cost

Project Identifiers

Financial

Unified Transportation Program

Statewide Transportation Improvement Program

Environmental

Department Initiatives

Ancestors grid

Descendants grid

Resources

Assets

Funding

Letting

Project Type:Construction

Project Stage:Initiate

*Project Subtype:

Project ID:System generated

County:County

District:District

*Highway:#####

*Control Section:#####

Project Details

Limits From*

Limits To*

Project Classification*

District Priority

Responsible District

Short Description*

Short Description lorem ipsum dolor sit amet velum aquius nuvo ellis

Project Description*

250 max characters ipsum dolor sit amet, consectetur adipiscing elit. Donec purus odio, varius at eros id, interdum hendrerit lacus. Donec sodales neque vel vulputate cursus. Curabitur vel enim ut tortor elementum faucibus eu ut magna. Class aptent volutpat.

Vision of the Future State

System Capabilities

Design and implementation of new system(s) to enable modernization

Organizational Capabilities

Improvement of information sharing and collaboration

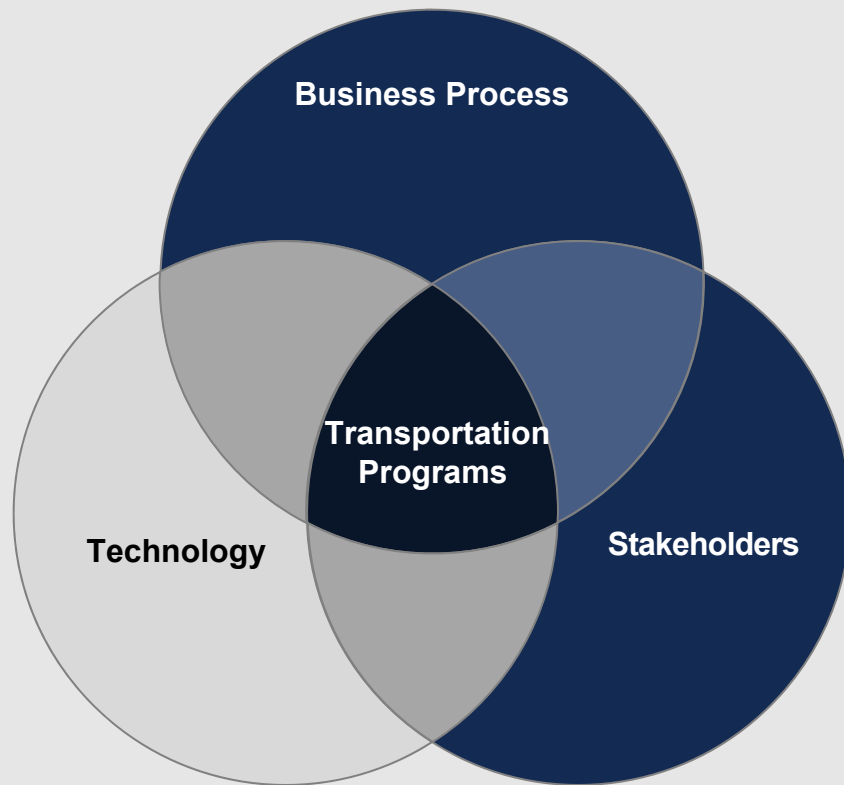
Process Design

Modification of business processes to reflect the business model TxDOT wishes to pursue

Decision Support/Analytics

Development of standard rules and reporting tools

Alignment of People, Processes, and Technology are Critical



Business Processes:

Agency aligned processes to deliver our Transportation Programs.

Training Available:

TPD100: On-line Introduction

TPD101: Instructor Led Overview

TPD102: Project Delivery & Governance

TPD103: Performance Based Planning

TPD104: Quarterly Review Process

Key Stakeholders:

TxDOT, Commission, MPOs, consultants and contractors

Technology:

TxDOTCONNECT is the solution to enable transportation program planning and delivery.



TxDOTCONNECT

Automating the Delivery of TxDOT's Transportation Programs:

- Program/Portfolio Management
- Project Management
- Right of Way

Project Timeline Revisions



Release 2 split into two deployments.

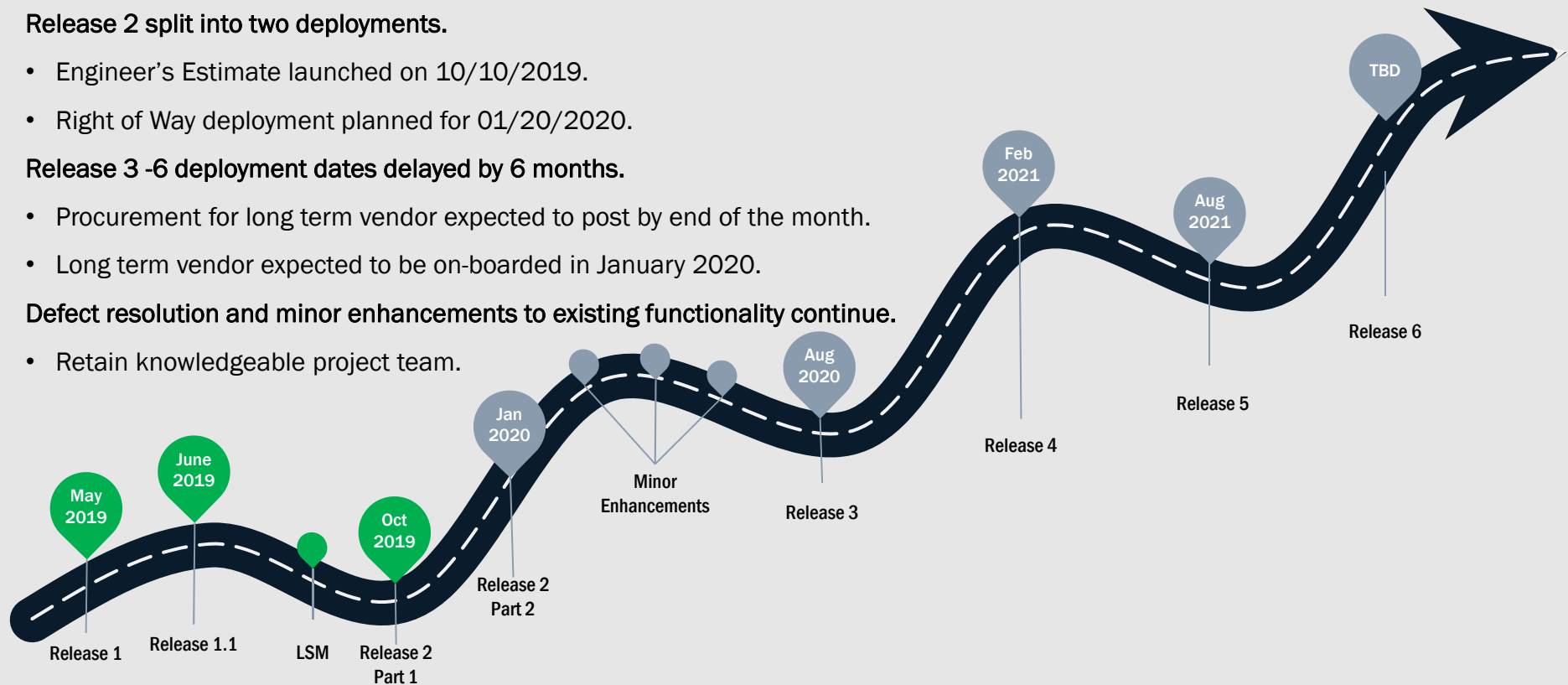
- Engineer's Estimate launched on 10/10/2019.
- Right of Way deployment planned for 01/20/2020.

Release 3 -6 deployment dates delayed by 6 months.

- Procurement for long term vendor expected to post by end of the month.
- Long term vendor expected to be on-boarded in January 2020.

Defect resolution and minor enhancements to existing functionality continue.

- Retain knowledgeable project team.



Project Release Scope Revision



Release 1

Construction
Projects

Release 2

Right of Way

Engineer's
Estimate

Release 3

Alternative
Delivery

Maintenance
Project

Unified
Transportation
Program

Release 4

Feasibility
Study

Total Project
Cost

STIP/TIP

Pre-letting

Release 5

Project
Schedules

Proposals

Division
Funding
Programs

Legacy
Integrations

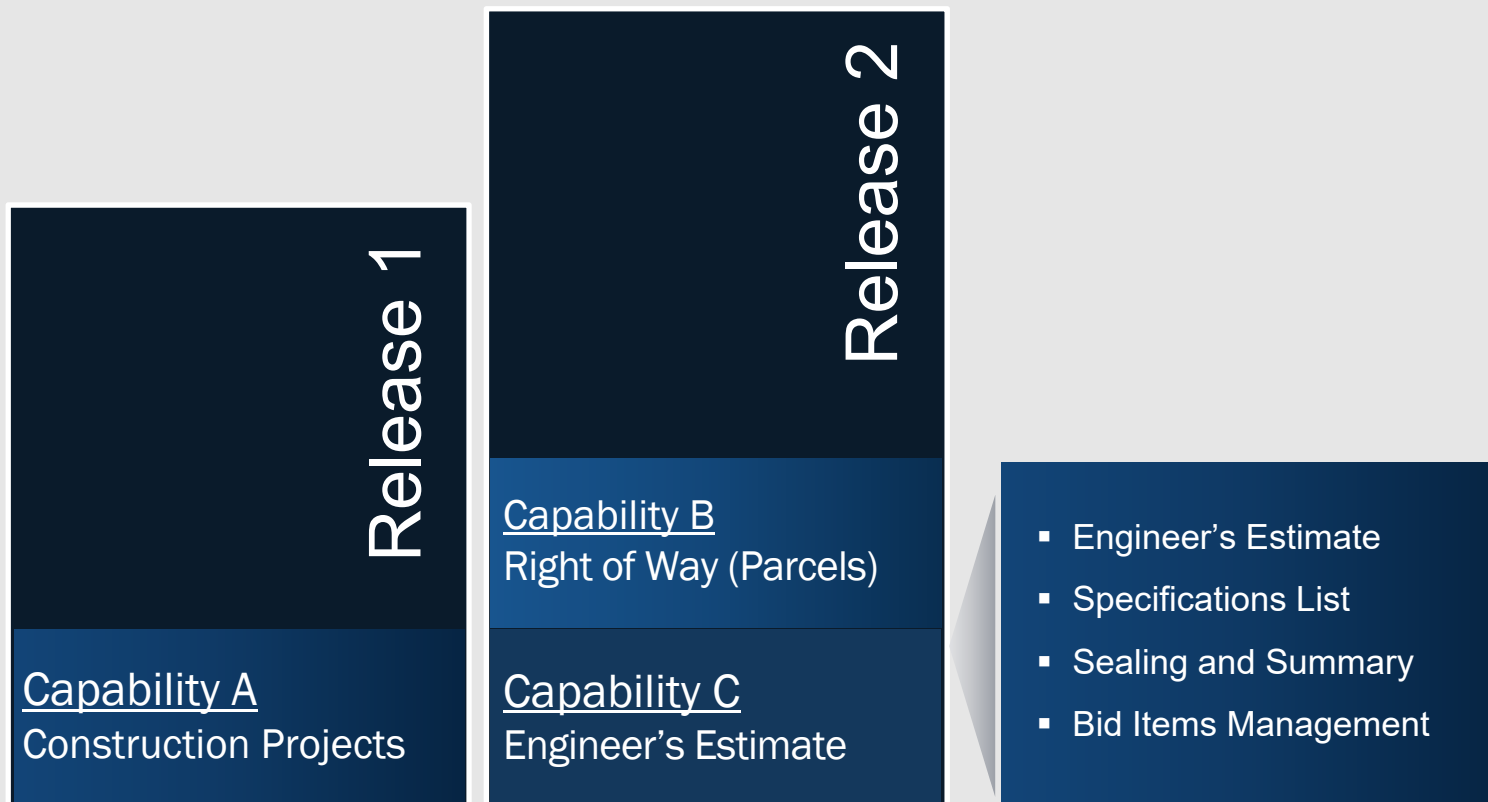
Release 6

Additive
Alternative

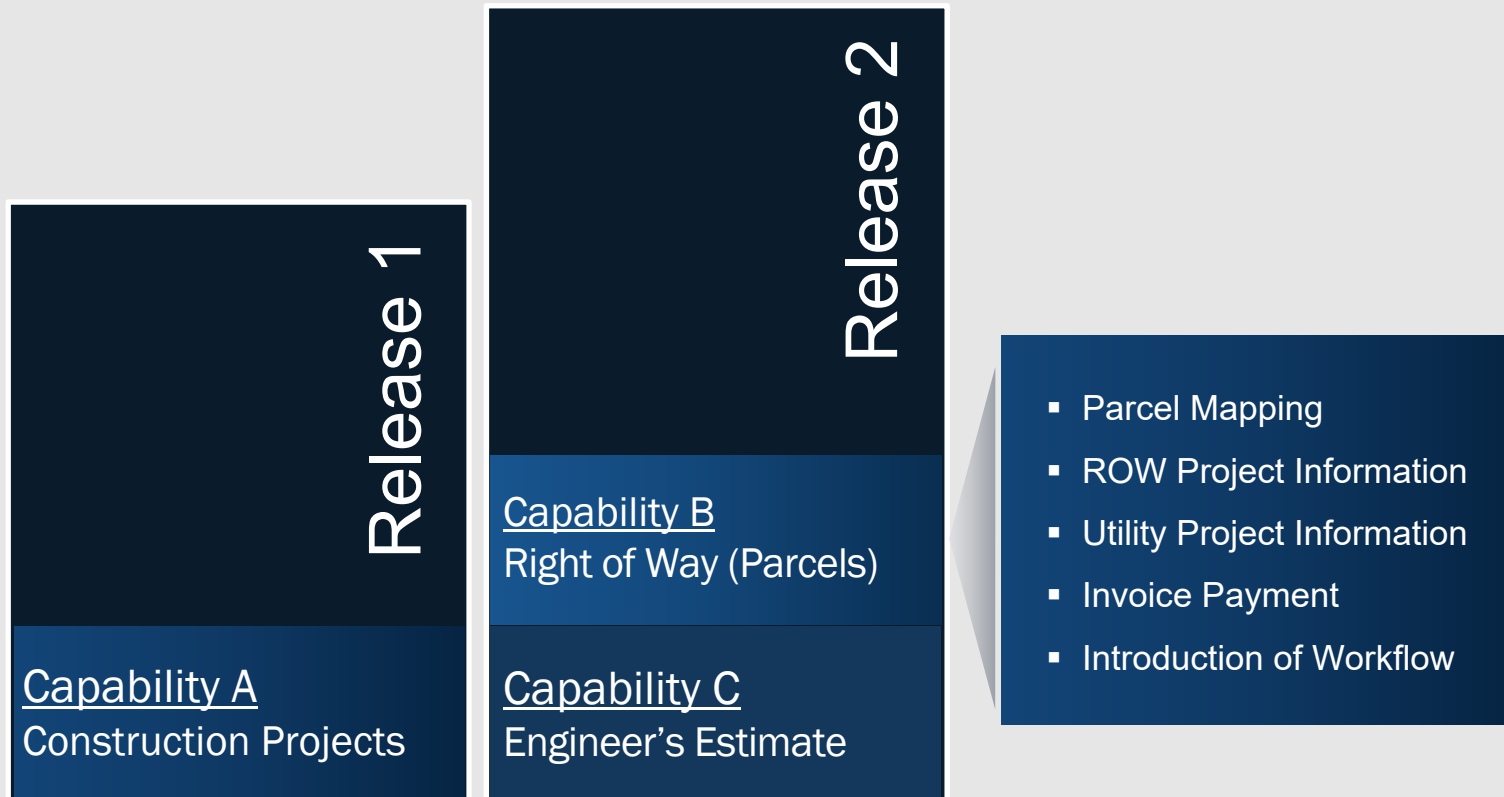
Division
Resource
Programs

Project
Comments

Release 2 October 2019 Deployment for Capability C – Engineer's Estimate



Release 2 January 2020 Deployment for Capability B – Right of Way



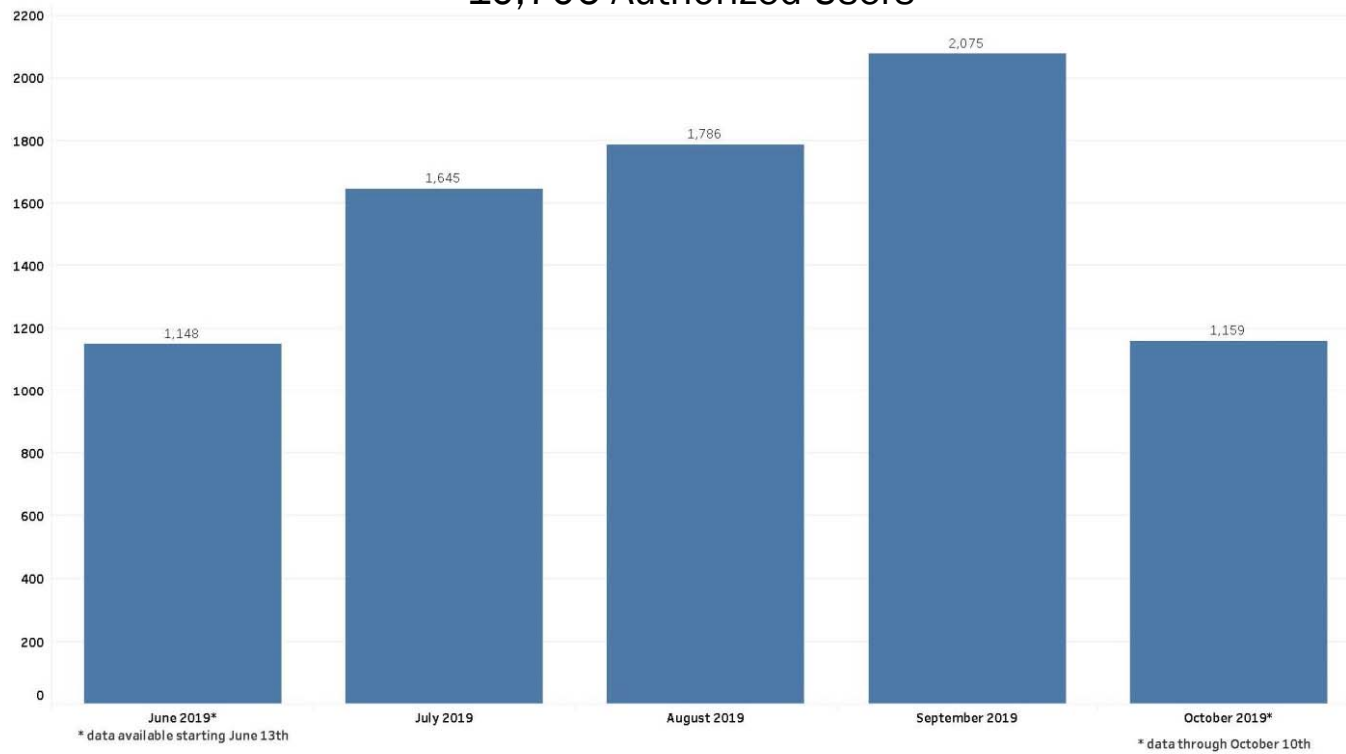
TxDOTCONNECT Fun Facts



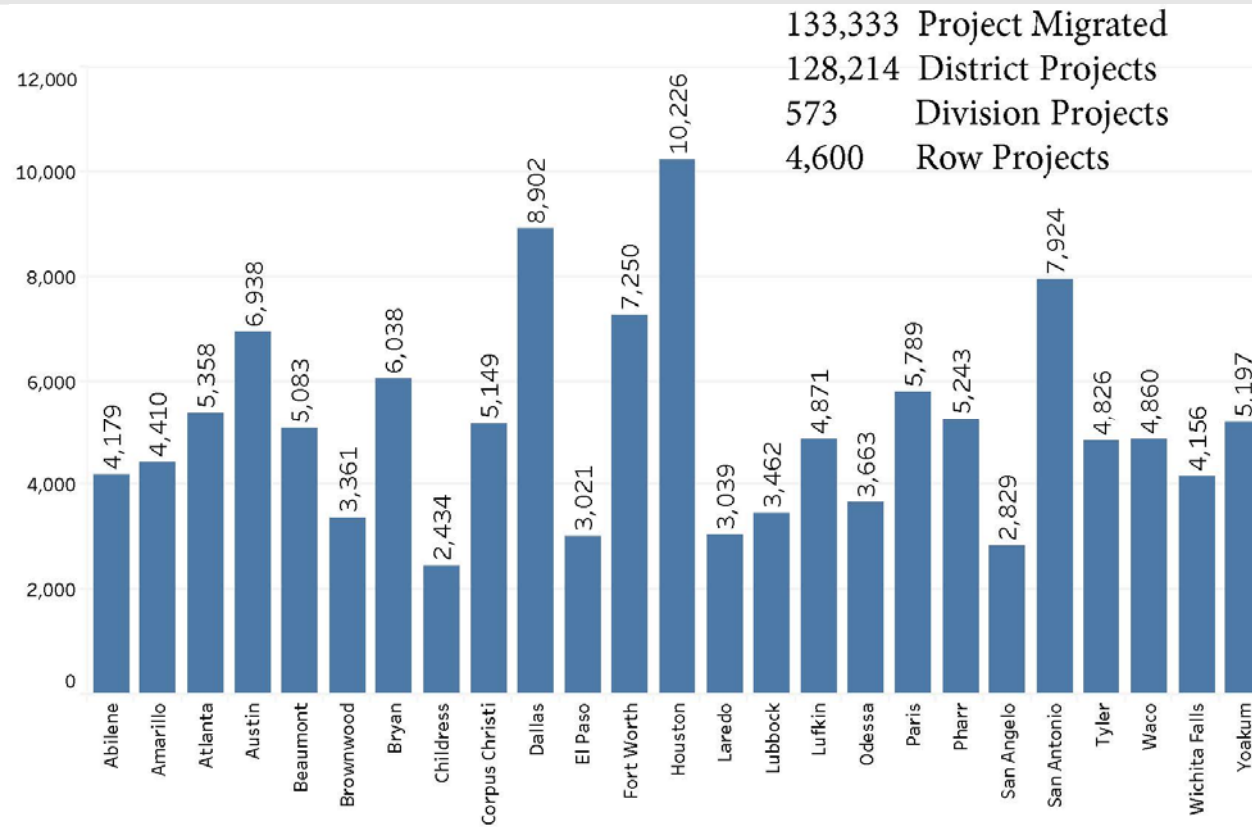
Authorized Users by Month



10,706 Authorized Users



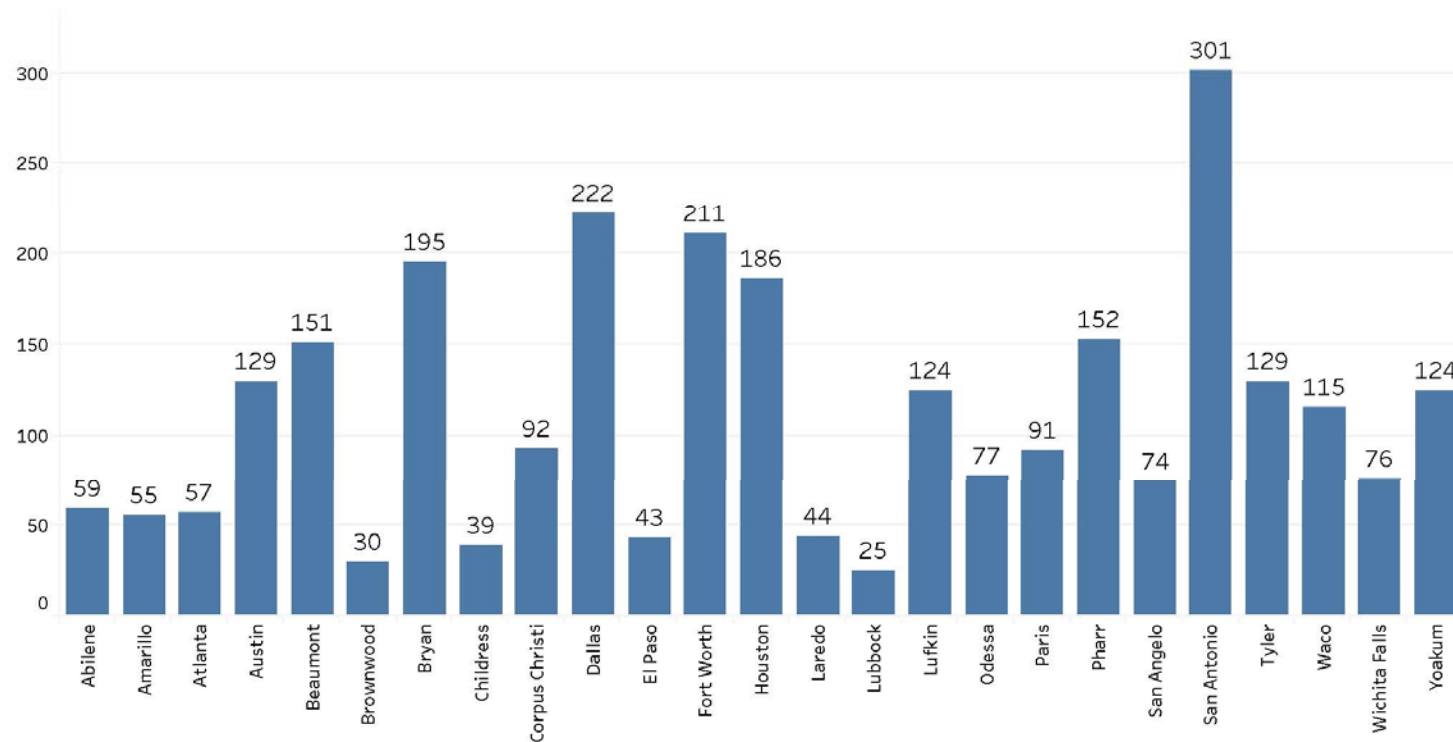
Projects Migrated



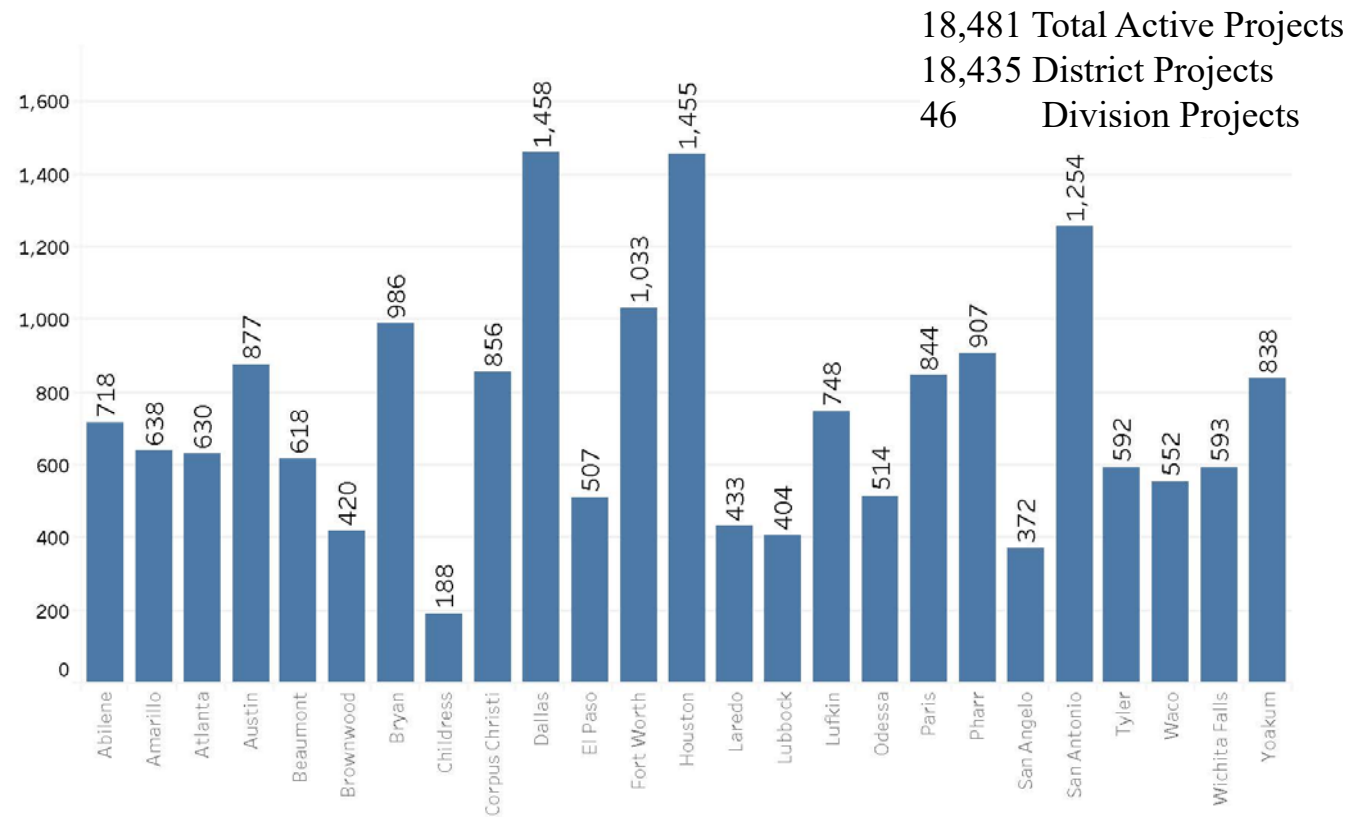
Projects Created by Districts



2,700 Project Created By Districts



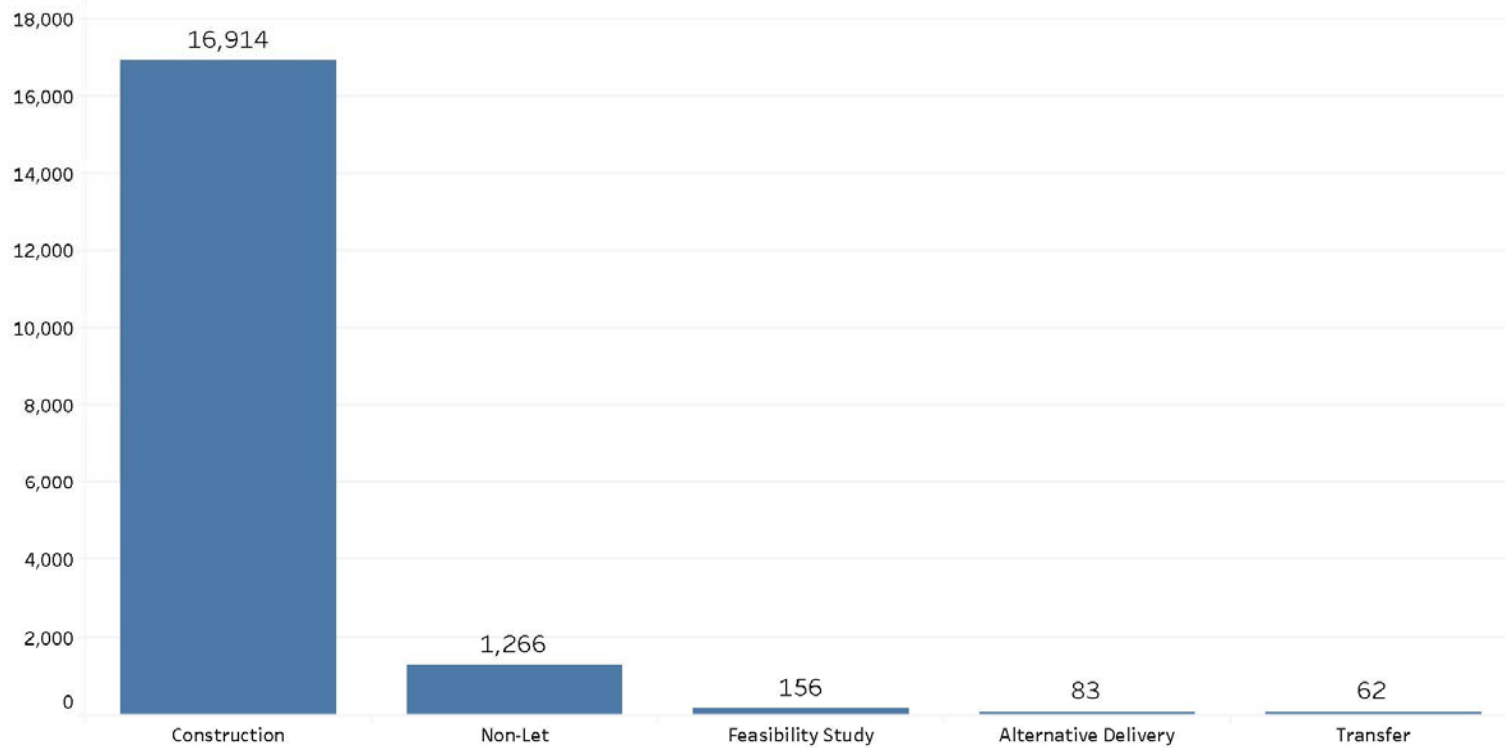
Active Projects



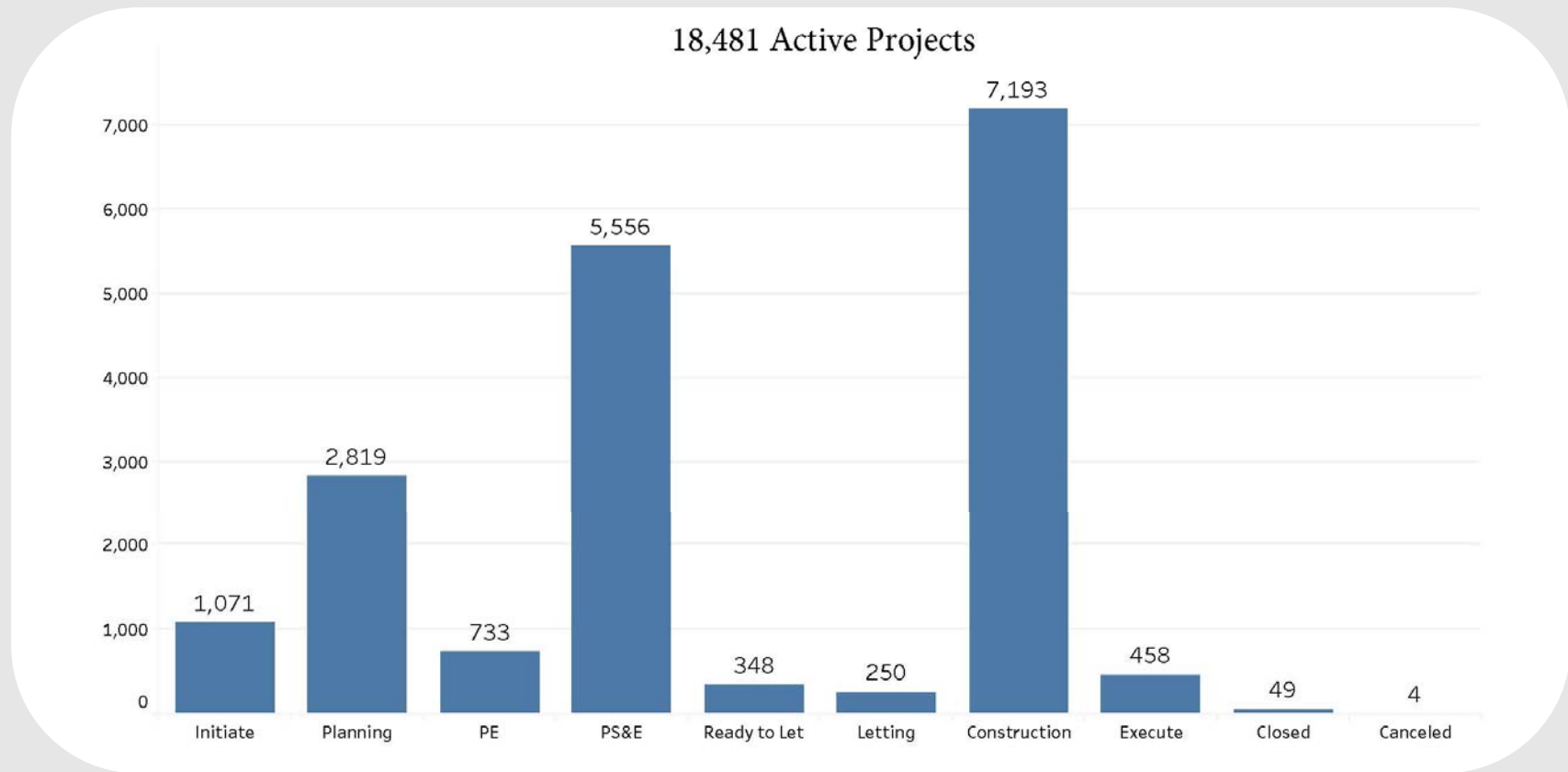
Active Projects by Project Type



18,481 Active Projects



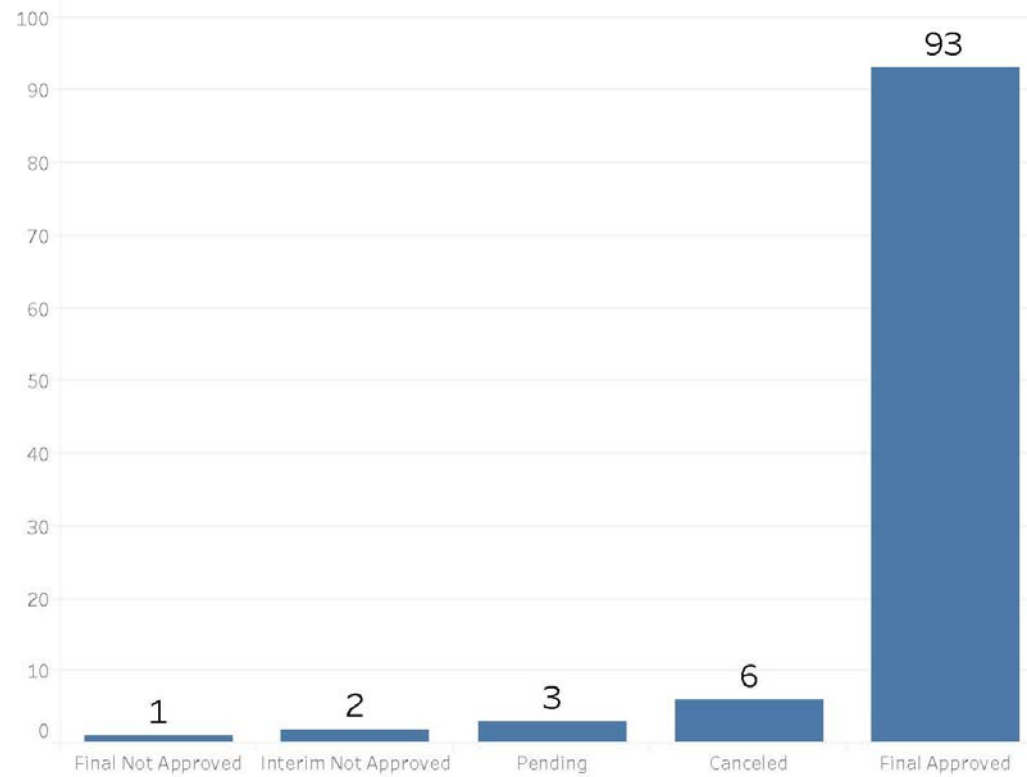
Active Projects by Project Stage



Letting Schedule Modification Forms in Workflow



105 Letting Schedule Modification Forms Processed in Workflow





TxDOT's Capital Project Development Cycle

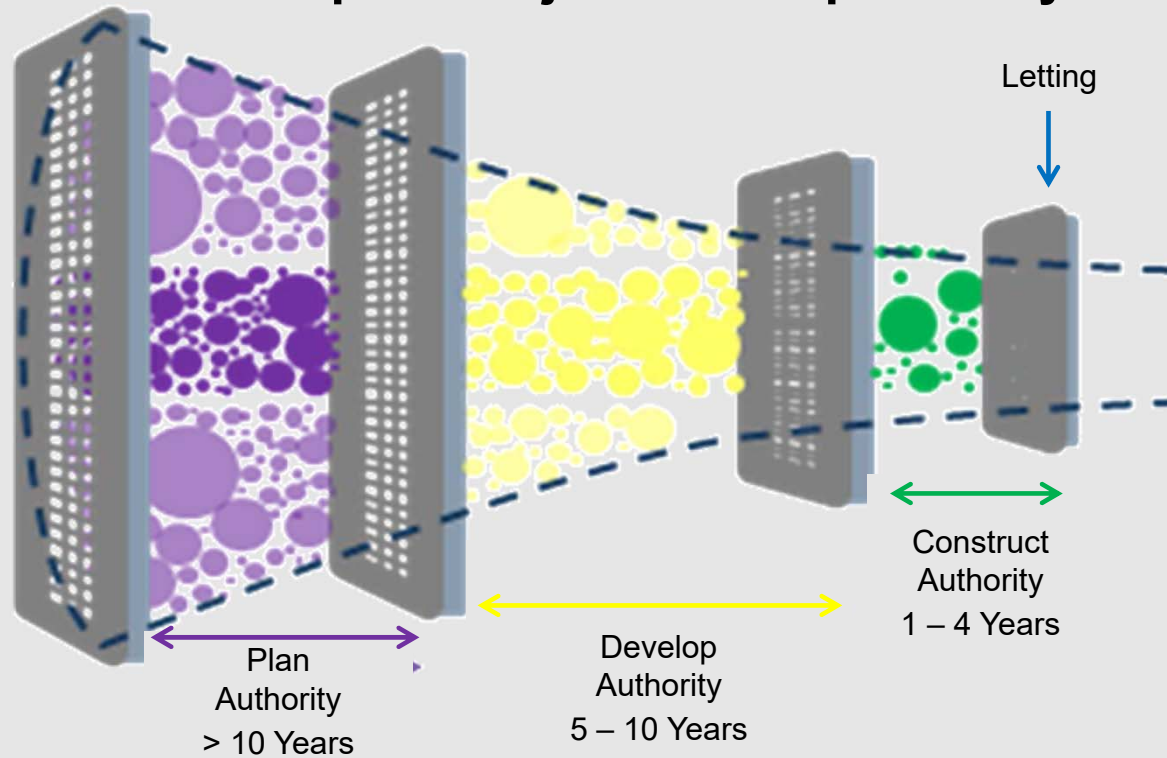


Tableau Demonstration

Ben McCulloch





Thank you!

Questions or Comments?

Contact the TxDOTCONNECT Project Team at TxDOTCONNECT@txdot.gov



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Commissioner Laura Ryan
Texas Transportation Commission