



DISTRICT 8 ASHE PRESENTATION
April 5, 2007


The map shows District 8 covering parts of Perry, Lebanon, Lancaster, Franklin, and Adams counties. Photos include a bridge, a building, a highway interchange, a road, a bridge, a building, a road, and a bridge.

OPEN PLAN



The illustration shows a man in a dark suit and tie, holding a funnel with a red cross on it in his right hand and a document with a bar chart in his left hand.

OPEN PLAN

- **S.O.L. 432-06-01 (June 30, 2006)**
 - Top 20 projects in each District by 12/31/06
 - Established guideline for new projects (pending)
- **Deltek's Open Plan Software (v3.1b)**
- **Deltek's WelcomHome (v4.3)**
- **Training**
 - Available through DOT
 - Two day training at various locations
 - Same training for both DOT and consultants
 - Training dates on ECMS calendar

OPEN PLAN

- Template(s)
- Standard naming convention (MPMS #)
- **PDSPRJ.bk3**
 - 8-0 to use this as template for all projects
 - Current version has nearly 100 activities
 - +/- 100 activities must be tracked if in project (no deletions)
- **PDSMASTER.bk3**
 - Optional tasks not in above template
 - Current version has hundreds of activities
 - Cut and paste needed activities into PDSPRJ.bk3 template
- Templates can be found at ECMS' Project Home screen

OPEN PLAN SCHEDULE 2007 ASHE CONFERENCE

Activity ID	Activity Name	Duration	Total Float	Start/Finish	Finish District
000	ASHE CONFERENCE	100	0	04/01/07	04/01/07
001	ASHE CONFERENCE	100	0	04/01/07	04/01/07
002	ASHE CONFERENCE	100	0	04/01/07	04/01/07
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OPEN PLAN

- Implementation
- Portfolio Manager supplies ".bk3" template
- PMs (DOT/cnsTnt) make changes
 - Establish logic connections
 - Set durations
 - some by District some by project team
- Submit to Portfolio Manager as ".pdf" file
- Portfolio Mng'r with DOT PM will review/edit/approve
- Consultant incorporate comments and creates .bk3
- Portfolio Mng'r will place into Open Plan server
- Portfolio Mng'r will create the initial baseline based upon late dates
- DOT PM sets up project in WelcomHome
- Consultants will progress in WelcomHome
- DOT PM will approve/reject in WelcomHome

OPEN PLAN

- **FOR NOW.....**
- **Monthly updates req'd**
 - By 25th. DOT PM reviews progressions in WelcomHome
 - After the 25th. DOT PM will run time analysis with "time now" being the 1st of the following month
 - 1st to 9th. PMs (DOT/Consultant) review schedules
- **Monthly Review**
 - Conducted between 1st and 9th day
 - Review and seek to correct any (-) float in letting (open bid)
 - Review estimated construction cost vs. approved construction cost
 - Review other anomalies
 - Any changes to activities to get back on schedule requires notations
 - May need to do Recovery Plan

OPEN PLAN

- **Recovery Plan**
- **Needed when.....**
 - If open bid date is not within +/- 15 days of original schedule
 - Estimated construction cost is not within +/-15% of approved.
 - Other anomalies
- **Creating a Recovery Plan**
 - Use the "default" notes category
 - Discuss what will be done to get project back on track
 - Revisit of durations (both consultant controlled and DOT controlled)
 - Consider lead/lag times where and if appropriate
 - Concurrent reviews
 - Let date only moved with Portfolio Managers approval.
 - Discuss differences in estimated vs. actual constr. costs in "cost" notes

CONSULTANT SELECTIONS

- Past year's selections in District 8-0
- 4 waves of bridge replacements/rehabs
 - 38 Engineering Agreements
- Several Engineering Open-End agreements
 - Modified Selection procedures
- Other Project specific agreements
 - Nye's Road in Dauphin County
 - Districtwide Bridge Inspection

CONSULTANT SELECTIONS

- District experiences with reviews of SOIs
- Positive areas
 - Adherence to following selection criteria
 - Good job at matching subs to specific tasks.
 - Most firms are accepting right-sizing, abbreviated structure submissions, GP-11s, etc. as more the norm than the exception.
 - Enhanced modified procedures/expectations are becoming better known.

CONSULTANT SELECTIONS

- Areas of Opportunity with SOIs
- Show past project similar to the Advertised projects
 - Response to a small bridge repl. should focus on similar replacements done in past
- “Cut and Paste” needs to be used with care
 - Several bridge repl. SOIs included text from other SOIs with different structure types and/or different agreement numbers.
 - This became more of an issue as the selection waves progressed.
- Many Enhanced Modified SOIs didn’t fit the ad group
 - Same response was found in SOIs submitted in different ad groups.
 - i.e., identical response for selection criteria number one was found on all SOIs submitted for wave of bridge selections.

DBE PARTICIPATION (as of 3/26/07)

- Current **OVERALL** DOT goal for technical contracts is 25.55%
- % DBE assigned to individual agrmts is generally <25%
 - Is set less as some technical contracts have DBEs as the prime
- Current policy excludes non professional services in calculating DBE goal
- Current Policy uses execution date of agreement for DBE goal measure

DBE PARTICIPATION

- DBE CERTIFICATION (technical contracts only)
- Certification ends when.....
- Average of three years gross receipts exceeds \$4,000,000
- "Decertified" firm can seek recertification
- Additional information on DBE information
 - Bureau of Equal Opportunity, DBE/Title 6 Office
 - (717) 783-7711 -or- (800) 468-4201

ECMS (II) Rewrite

- 2005 – Began updating Wave 3
 - Consultant selection, agrmt management, invoicing
- 2006 – CO/Districts task force
 - CAD, Districts participated in JAR
 - "Tore apart" Wave 3 seeking to improve
- 2007 – Rewrite of Wave 3 completed
 - UAT in July and August
 - Rollout in 2008.

NEW PROJECTS THROUGH 2007

- In Progress
 - US 11/15 Rock Slope (E 01002)
 - Shortlisting in either April or May
 - Local Bridge Inspection in Lancaster Co.
 - Planned project Status
 - Advertisement within next few weeks
 - PA 283 Reconstruction
 - Planned project status
 - Advertisement by end of April 2007
 - Conventional selection procedures
 - I-83 Exit 4 (PA 851/Shrewsbury) Interchange reconstruction
 - Begin selection in second half of 2007.
 - Open End Engineering/Environmental Agreements
 - Ongoing as existing open-end agreements reach capacity
 - Capacity guidelines are 70% encumbered and 50% invoiced.
