



***“An Overview of Planning & Scheduling for LADOTD Projects**”*

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PLANNING & SCHEDULING

OVERVIEW

- **PLANNING VS SCHEDULING**
- **BOTH ARE PROJECT MANAGEMENT FUNCTIONS**
- **TYPES OF PLANS**
 - **TOOLS FOR PLANNING**
 - **STEPS IN PLANNING PROCESS**
- **TYPES OF SCHEDULES**
 - **STEPS IN SCHEDULING PROCESS**

<https://www.pmi.org/learning/library/planning-scheduling-managing-project-8510>

AGC's *Construction Planning and Scheduling*

PLANNING & SCHEDULING

PLANNING VERSUS SCHEDULING

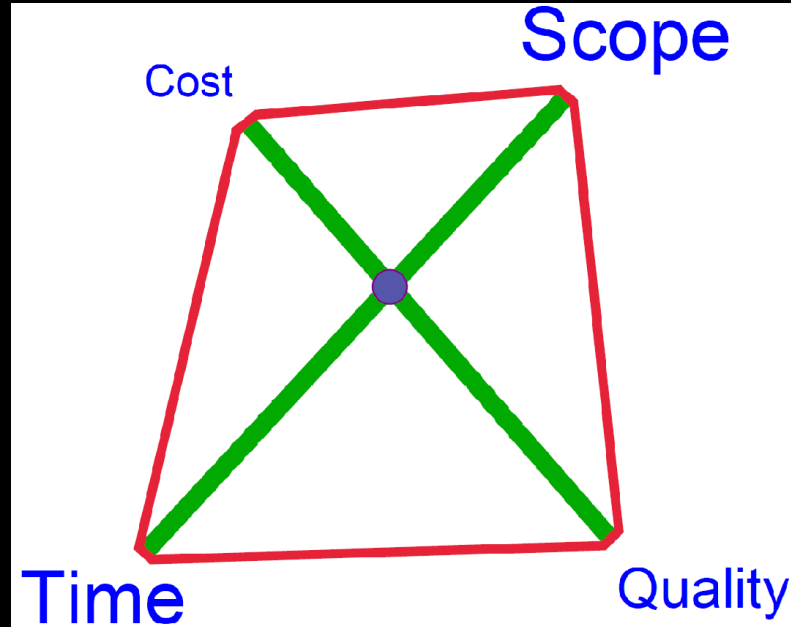
PLANNING – SELECTING POLICIES AND PROCEDURES IN ORDER TO ACHIEVE THE OBJECTIVES

SCHEDULING – CONVERTS PROJECT ACTION PLANS FOR SCOPE, TIME, COST & QUALITY INTO OPERATING TIMETABLE

PLANNING & SCHEDULING

INTER-RELATED DIMENSION FOR PROJECT

- ✓ SCOPE
- ✓ COST
- ✓ QUALITY
- ✓ TIME



PLANNING & SCHEDULING

Project Management Functions

- ❑ Planning
- ❑ Scheduling
- ❑ Monitoring
- ❑ Controlling

PLANNING & SCHEDULING

Project Management Functions

☐ Planning

- Eliminate/reduce project risk
- Obtain understanding of project objectives
- Strategize to achieve objectives w/ available resources
- Develop framework for monitoring/controlling project

☐ Scheduling

☐ Monitoring

☐ Controlling

PLANNING & SCHEDULING

Project Management Functions

- Planning

- **Scheduling determines when**

 - work Must be done

 - When Can be done

 - When Should be done

- Monitoring

- Controlling

PLANNING & SCHEDULING

Project Management Functions

- Planning

- Scheduling

- **Monitoring**

 - Underway... ensure goals and objectives being met

 - Track time, resources & budget

- Controlling

PLANNING & SCHEDULING

Project Management Functions

- Planning

- Scheduling

- Monitoring

- **Controlling**

 - Problems and surprises

 - Adjust/rework plan so project goals and objectives can be met

PLANNING & SCHEDULING

Project Management Functions

- Plan
- “Do”
- Measure
- Adjust
- ...repeat

PLANNING & SCHEDULING

PLANNING IS AN ON-GOING PROCESS

EXAMPLES

STRATEGIC PLANNING

OPERATIONAL PLANNING

PROJECT PLANNING

PLANNING & SCHEDULING

TYPES OF PLANS

EXAMPLES:

BUSINESS PLAN

RESOURCE PLANNING

QUALITY PLANS

RISK MANAGEMENT

PLANNING & SCHEDULING

3 MAIN TOOLS FOR PLANNING OF A PROJECT

- SOW- SCOPE OF WORK
- WBS – WORK BREAKDOWN STRUCTURE
- SCHEDULE

PLANNING & SCHEDULING

SCOPE OF WORK

- ☐ WHAT (PROJECT TITLE)
- ☐ WHO ARE STAKEHOLDERS
- ☐ WHEN (PROPOSED START/ EXPECTED FINISH)
- ☐ HOW MUCH
- ☐ BY WHO (PROJECT MANAGER)
- ☐ OTHER

PLANNING & SCHEDULING

WORK BREAKDOWN STRUCTURE

- ❖ BASED ON DELIVERABLES OR PRODUCTS OR
- ❖ BASED ON TASKS DETAILING THE WORK TO BE DONE

ITS TREE-LIKE; BRANCHES AT EACH LEVEL OF DETAIL

PLANNING & SCHEDULING

SCHEDULE

PUT TASKS ON TIMELINE

IN PROPER SEQUENCE TO

ACCOMPLISH ALL

PLANNING & SCHEDULING

REVIEW: STEPS IN PLANNING PROCESS

- ❑ TRANSFORM THE SOW INTO THE WBS
- ❑ DETERMINING REQUIREMENTS
- ❑ FORMULATING THE SCHEDULE

PLANNING & SCHEDULING

SOME TYPES OF SCHEDULES

- CRM
- CONTRACTED BACKLOG
- DOTD REQUIRES CONSTRUCTION PROGRESS SCHEDULE FOR EACH PROJECT

TWO TYPES: BAR CHART OR CPM

ALSO SEE EDSM No. III.1.1.19 *CHARGING AND REPORTING CONTRACT TIME...*

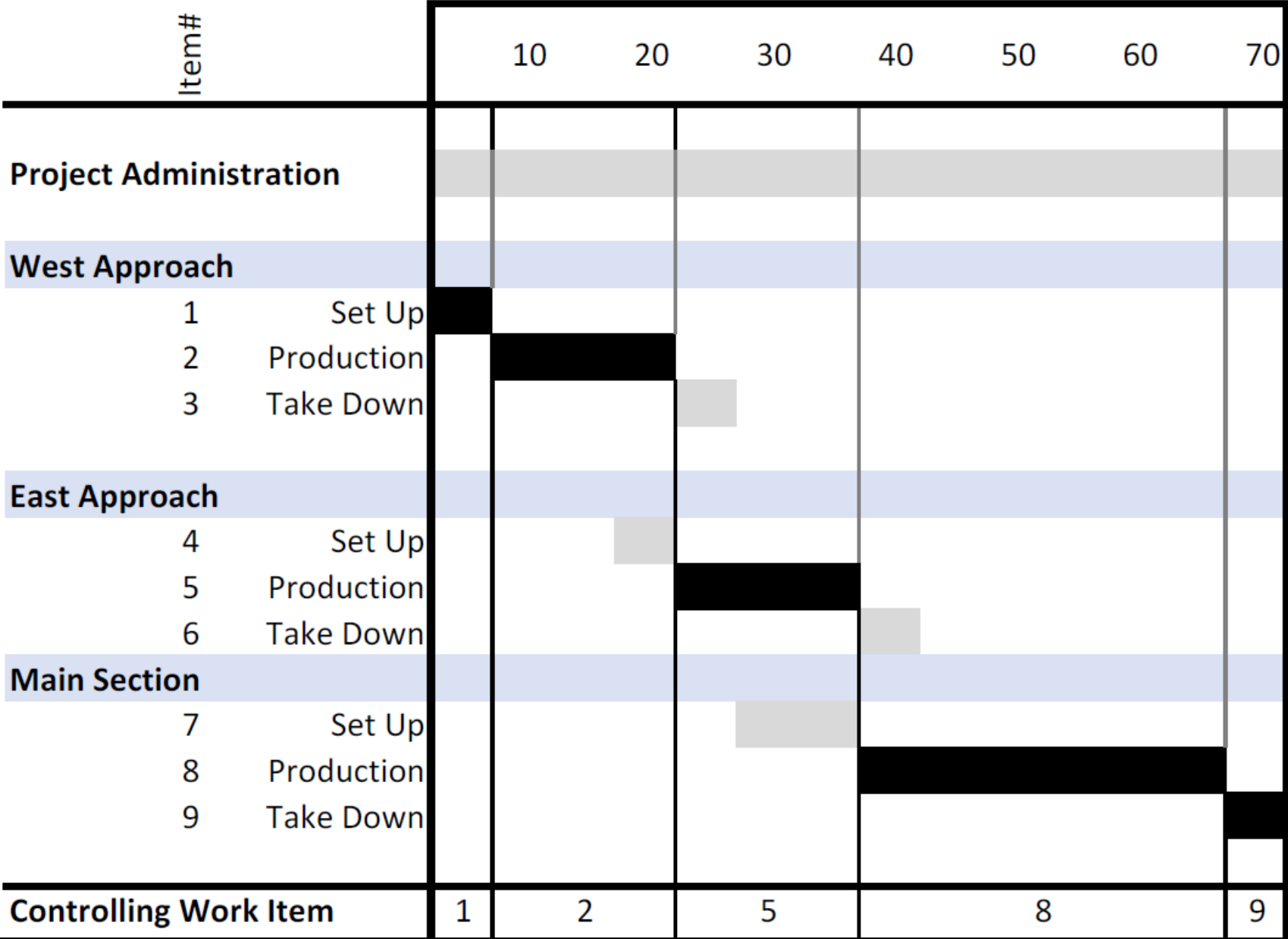
Sample CRM Report

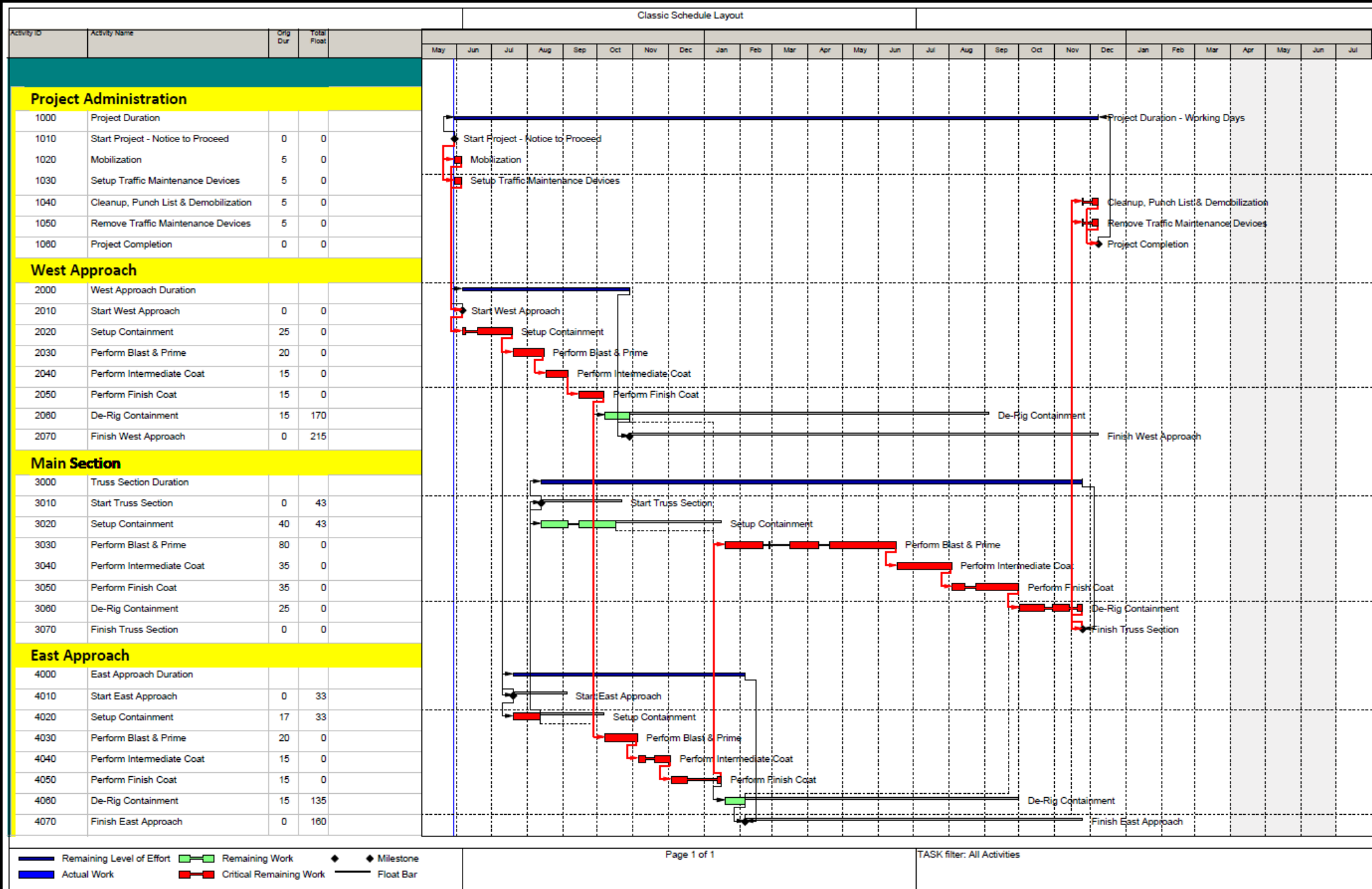
Opportunity Number	Project Number	Primary Client	Opportunity Name	Stage	Days Open	Estimates			Weighted Revenue	Table/"Bar Chart" many months (columns) wide >
						Estimated Start Date	Estimated Finish Date	Estimated Revenue		
1004		Names	Big One	0-Initial Verbal Contact	##			\$1,000,000	\$0	<div></div>
1002		Names	CPM Class	10-Presentation/Demo	##			\$10,000	\$1,000	<div></div>
1003		Names	Bridge	80-Proposal - Won	##			\$100,000	\$80,000	<div></div>
1001	#####	Names	Highway	100- Contract Signed	##			\$100,000	moves	<div></div>

Backlog 2021-0105

SJB#	Current Budget	EOP	on DD	Jan 21	Feb 21	Mar 21	Apr 21	May 21	Jun 21	Jul 21	Aug 21	Sep 21	Oct 21	Nov 21
60259.0 H.0023	00.70	07-May-21	26-Aug-20	\$ 197	\$ 197	\$ 197	\$ 197	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
60270.0 H.012	-	See TOX		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
60270.1 H.012	89.00	31-Jan-22	01-Sep-20	##	##	##	##	##	##	##	##	##	##	##
60273.0 H.011	89.00	Need RBL		\$ -	###	##	##	##	##	##	##	??	??	??
60276.0 H.013	4.00			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
60276.1 H.013	00.50	25-Aug-21	04-Jul-20	##	##	##	##	##	##	##	##	\$ -	\$ -	\$ -
60277.0 H.0096	08.02	28-Jul-21	01-Aug-20	###	###	###	get >>	\$\$\$	\$\$\$	\$\$\$	\$	\$ -	\$ -	\$ -
60278.0 H.012	88.00	Need RBL		\$ -	\$ -	\$ -	\$ -	d RBL	###	##	##	##	##	##
60281 H00232	85.50	05-May-23	01-Oct-20	##	##	##	##	##	##	##	##	##	##	##
60282 H01001	68.00	07-Feb-22	17-Jun-20	##	##	##	##	##	##	##	##	##	##	##
60283.0 H01175	78.89	27-Sep-21	06-May-20	##	##	##	##	##	##	##	##	##	##	##
60285 H.0031	45.25	25-Sep-24	17-Aug-20			##	##	##	##	##	##	##	##	##
Actual				####	####	####	####	####	####	####	####	####	####	####
Projected														

Sample - Working Day Construction Progress Schedule



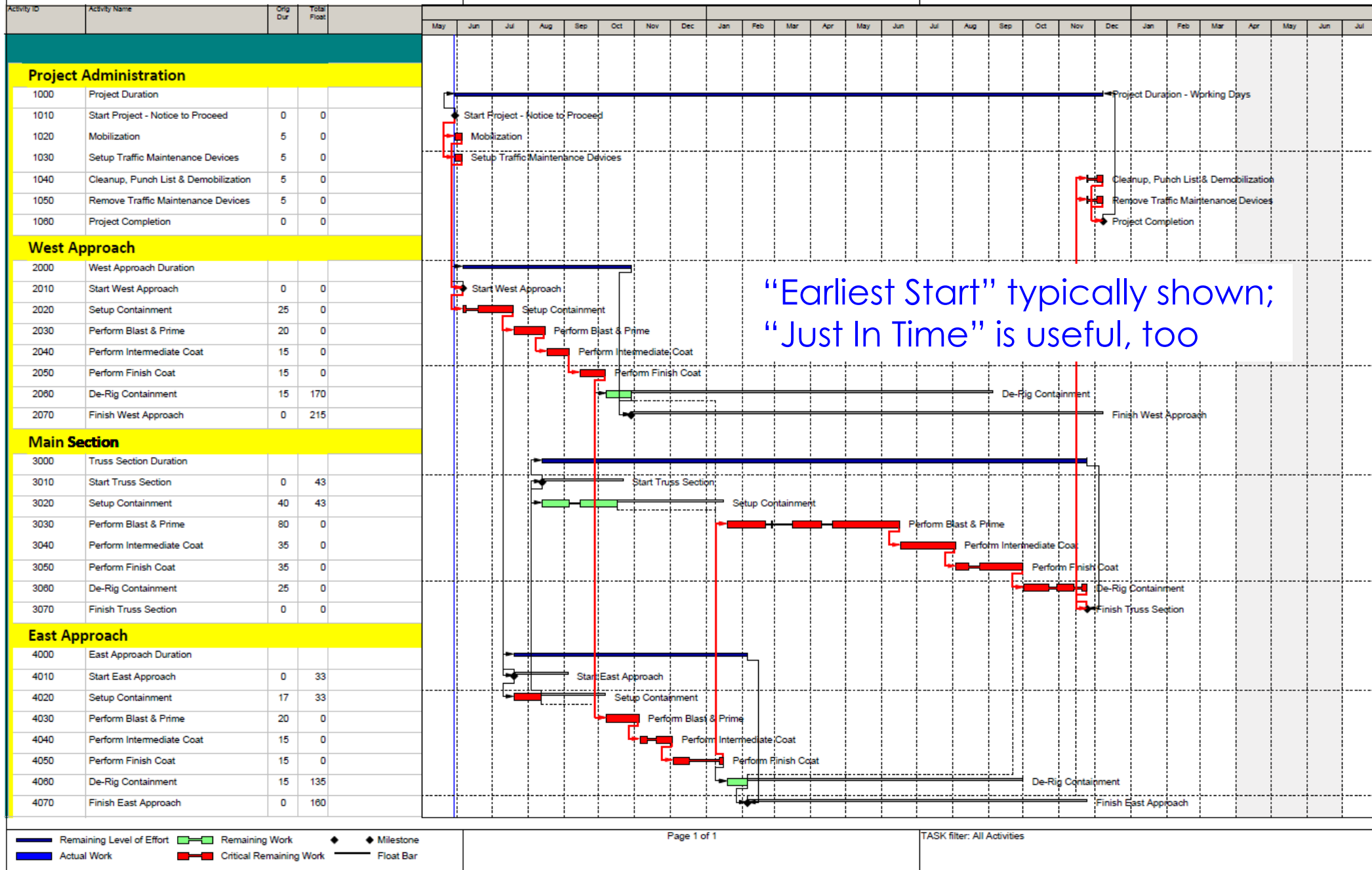


PLANNING & SCHEDULING

STEPS TO PREPARE A CPM SCHEDULE

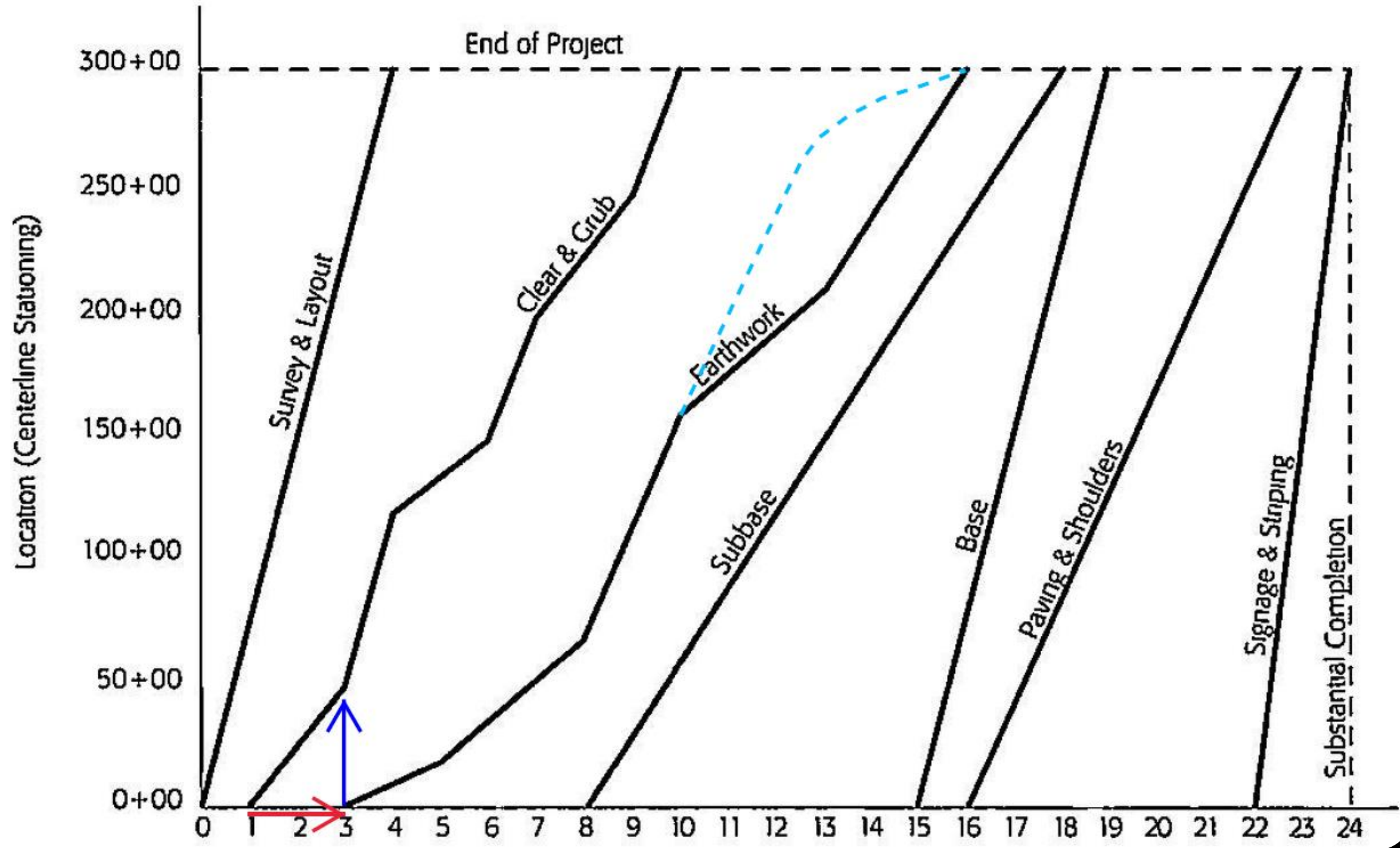
- TASKS
- PRIORITIZE
- DURATIONS: EFFORT-DRIVEN OR FIXED AMOUNT
- RESOURCES
- SEQUENCE
- TIMELINE

WHITE BOARD



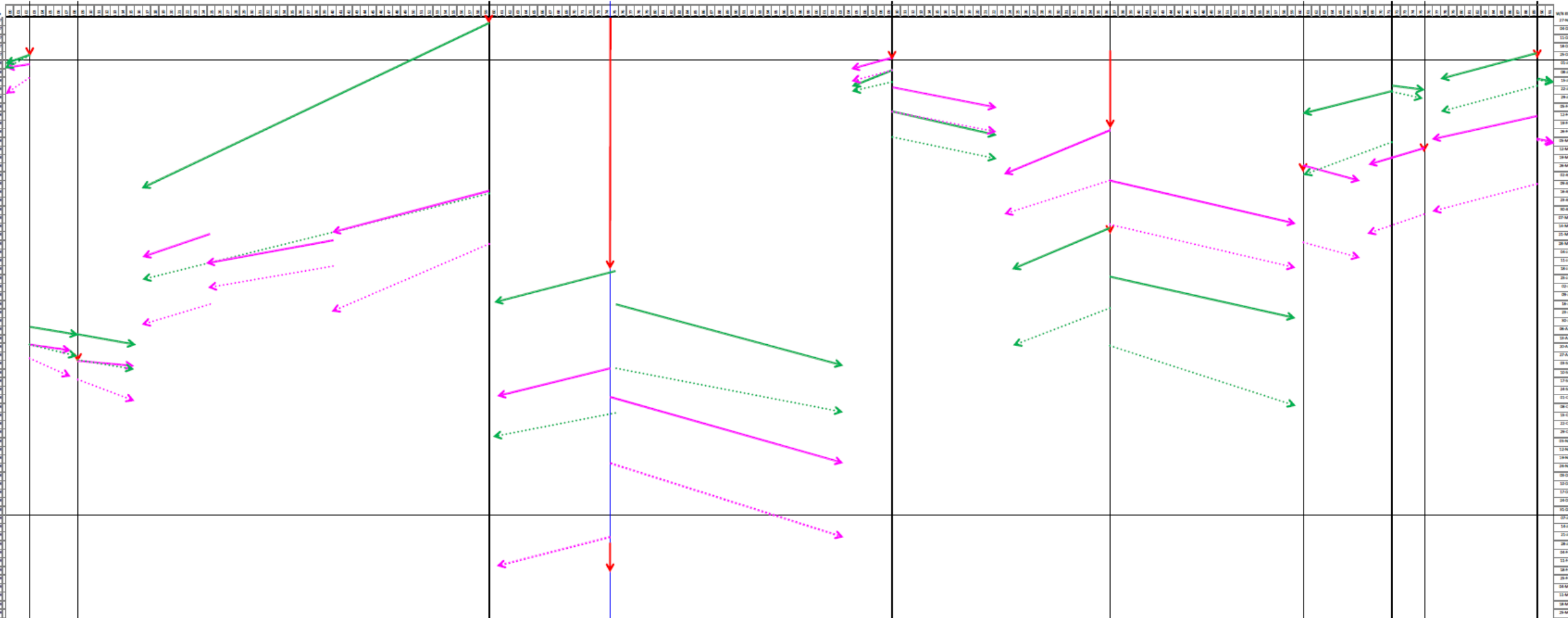
PLANNING & SCHEDULING

LINEAR SCHEDULING EXAMPLES



Work Sequence for Storm Water Drainage activities - per pOBL-02

Work Sequence for Storm Water Drainage activities - per pOBL-02



PLANNING & SCHEDULING

CONCLUSION

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QUESTIONS

THANK YOU

