

Project Tracking System

Purpose

- **To enhance the project delivery and budgeting capabilities of the Long Beach Redevelopment Agency.**

Goals

- **Improve the Delivery of Projects**
 - ✓ Develop repeatable processes across the Agency
 - ✓ Standardize the tracking and reporting of key milestones
 - ✓ Identify areas of schedule and budget variability or uncertainty
 - ✓ Document processes to aid in training new hires

Goals

- **Improve Communication of Project Status**
 - ✓ Increase the visibility of a project's progress to staff, the Board, and other City Departments, such as Planning or Public Works
 - ✓ Increase transparency to the City and the public
 - ✓ Educate the public on the process and duration of projects

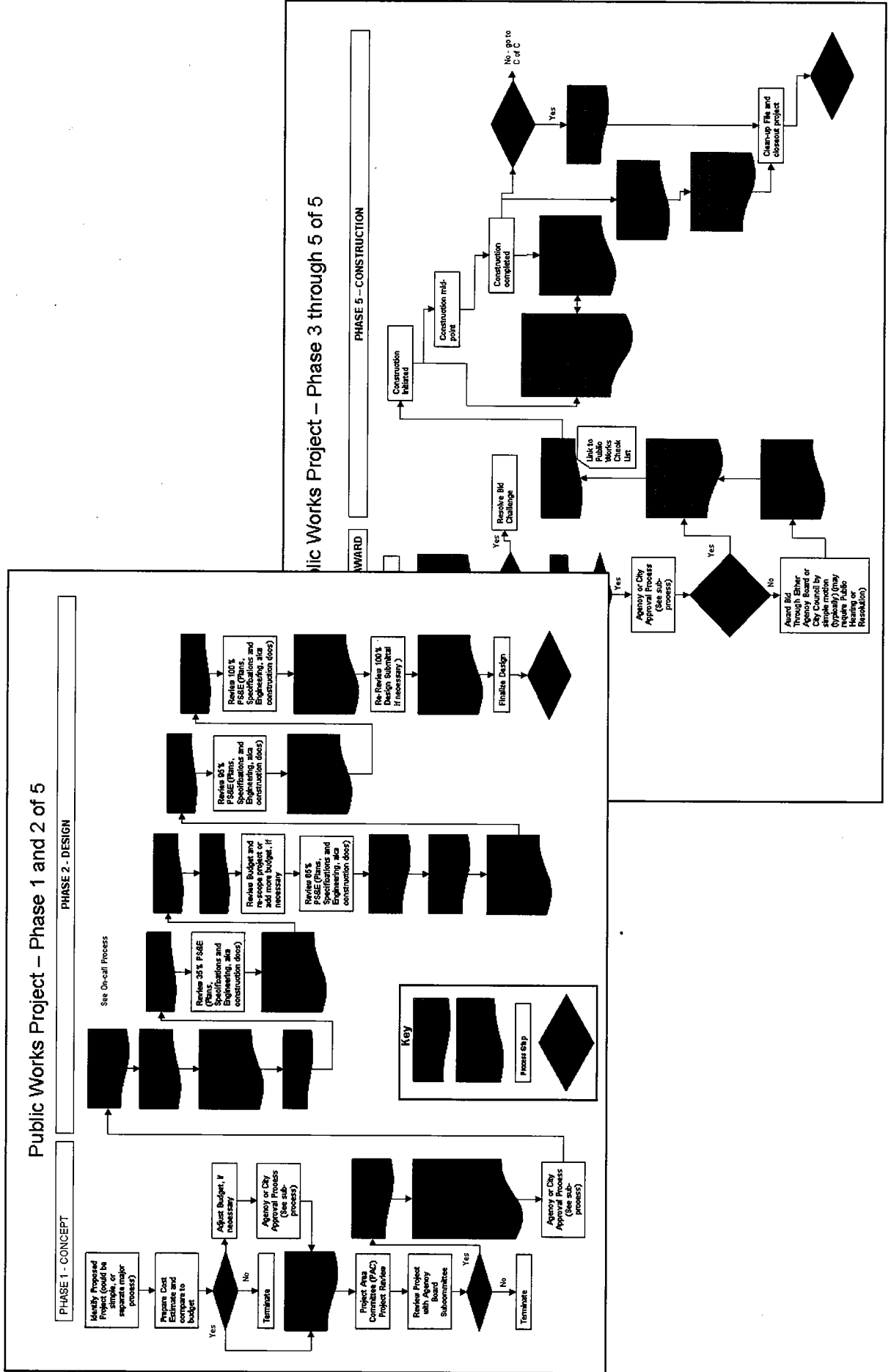
Goals

- **Improve the budgeting process and cash flow projections**
 - ✓ Create time-based project expenditure projections
 - ✓ Provide a tool to quickly model project cost scenarios

Delivering the Tool

- 1. Document process**
- 2. Develop schedule templates**
- 3. Customize template and add budget**
- 4. Build budget cash flow curves**
- 5. Track and report progress**
- 6. Post summary schedule on Agency web site for public viewing**
- 7. Aggregate planned projects for Agency-wide budget projections**

Step 1 – Document Process



Public Works Project – Phase 3 through 5 of 5

Step 2 – Develop Schedule Templates

Public Works - Microsoft Internet Explorer

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Address <https://www.viewpath.net/Projects/Tasks.aspx?ID=a62b50f4-03fe-4206-80bb-8ae5aaf5bc20>

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Viewpath Team: LBRA - Public Works

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Active Projects : Public Works

#	Task	%	Work Days	2006	Q1 2007	Q2 2007	Q3 2007	Q4 2007	G1 2008
1	Public Works	0	584 days						
1.1	PHASE 1 - CONCEPT	0	129 days						
1.1.1	Identify Proposed Project	0	1 day						
1.1.2	Prepare Cost Estimate	0	10 days						
1.1.3	Adjust Budget, if necessary	0	20 days						
1.1.4	City approval process if needed	0	20 days						
1.1.5	Presentation Pack to visualize pr...	0	10 days						
1.1.6	Project Area Committee (PAC)	0	45 days						
1.1.7	Review Project with Agency	0	3 days						
1.1.8	Request City Attorney Action Form	0	10 days						
1.1.9	City Attorney - 33445 Resolution	0	10 days						
1.1.10	Agency Approval Process	0	20 days						
1.2	PHASE 2 - DESIGN	0	182 days						
1.2.1	Request design proposal from On-	0	10 days						
1.2.2	Obtain Proposal for PS&E from On-	0	10 days						
1.2.3	Review & Acceptance of Scope of	0	5 days						
1.2.4	Issue Notice to Proceed	0	5 days						
1.2.5	A&E Submits 35% Design	0	20 days						
1.2.6	Review 35% PS&E	0	10 days						
1.2.7	Obtain Department/Bureau	0	5 days						
1.2.8	A&E Submits 65% Design	0	1 day						
1.2.9	A&E Submits Engineer's Estimate	0	5 days						
1.2.10	Review Report and re-estimate	0	5 days						

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Done

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Step 3 - Customize Template and Add Budget

https://www.viewpath.net - Public Works - Microsoft Internet Explorer

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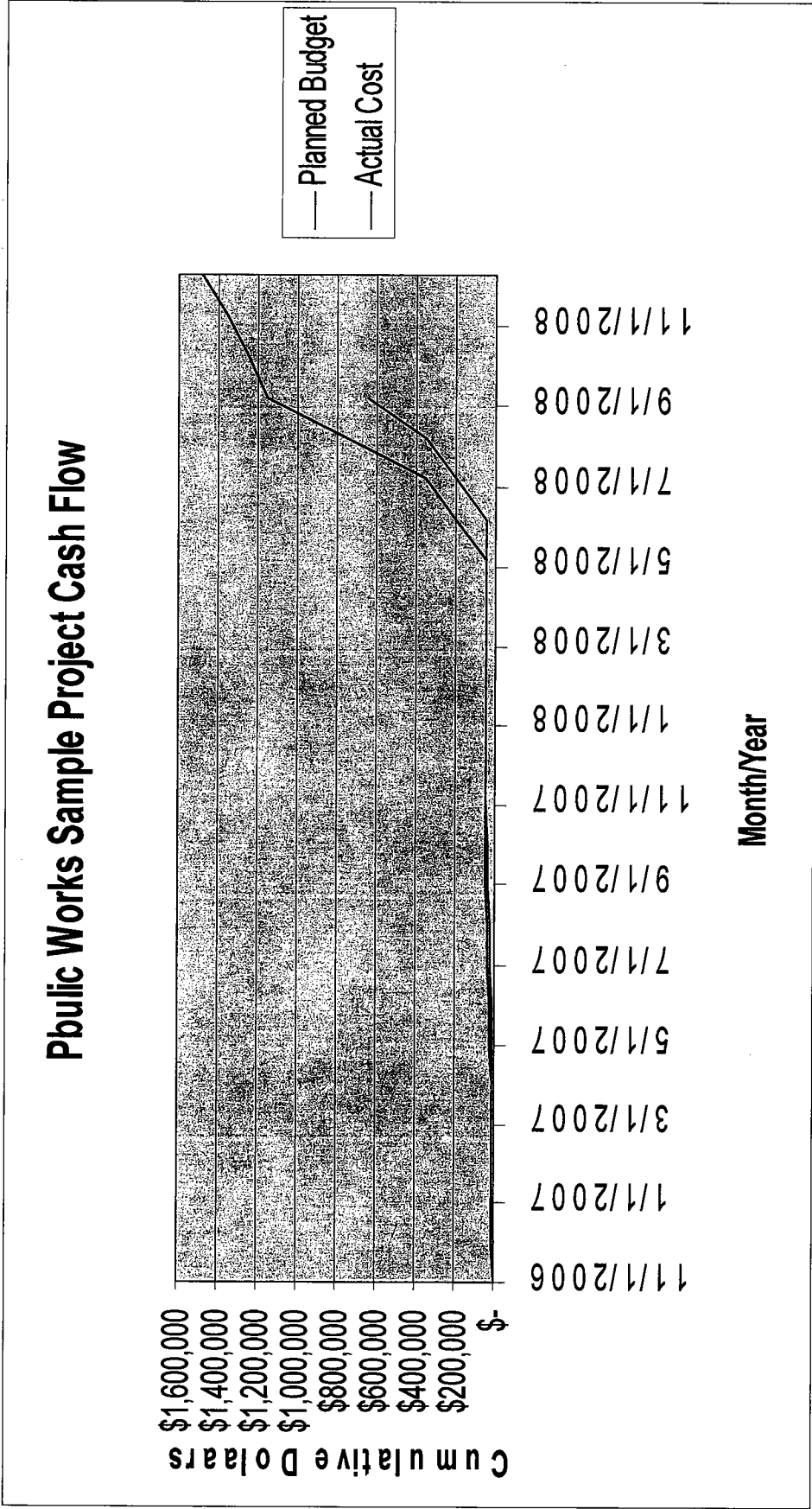
Tasks Documents Baselines

Show Gantt

Active Projects : **Public Works** Export | Print

#	Task	hrs	Start	Finish	Budget	G1 2008	G2 2008	G3 2008	G4 2008
1	Public Works	0	Mon, Nov 13	Thu, Jan 29	1475500				
1.1	PHASE 1 - CONCEPT	0	Mon, Nov 13	Thu, May 10	0				
1.2	PHASE 2 - DESIGN	0	Fri, May 11	Mon, Jan 14	40500				
1.3	PHASE 3 - ADVERTISE	0	Tue, Jan 15	Mon, Feb 25	0				
1.4	PHASE 4 - AWARD	0	Tue, Feb 26	Thu, Jul 03	0				
1.4.1	Open Bids	0	Tue, Feb 26	Tue, Feb 26	0				
1.4.2	Select lowest responsive bidder	0	Wed, Feb 27	Wed, Feb 27	0				
1.4.3	Staff Report	0	Thu, Feb 28	Wed, Mar 05	0				
1.4.4	Agency or City Approval Process	0	Thu, Mar 06	Wed, Apr 02	0				
1.4.5	Award Bid Through Either Agency	0	Thu, Apr 03	Wed, Apr 30	0				
1.4.6	Letter to contract or with contract	0	Thu, May 01	Thu, May 01	0				
1.4.7	Contractor returns executed	0	Fri, May 02	Thu, May 29	0				
1.4.8	Agency executes contract and	0	Fri, May 30	Thu, Jun 05	0				
1.4.9	Pre-construction meeting	0	Fri, Jun 06	Thu, Jul 03	0				
1.5	PHASE 5 - CONSTRUCTIONS	0	Fri, Jul 04	Thu, Jan 29	1435000				
1.5.1	Construction Initiated	0	Fri, Jul 04	Thu, Aug 28	300000				
1.5.2	Construction Midway	0	Fri, Aug 29	Thu, Oct 23	800000				
1.5.3	Construction Completed (last third)	0	Fri, Oct 24	Thu, Dec 11	200000				
1.5.4	Managed / Oversee construction	0	Fri, Jul 04	Thu, Dec 18	0				
1.5.5	Contractor Invoices & Request	0	Fri, Jul 04	Thu, Dec 18	0				
1.5.6	Certificate of Completion Records...	0	Fri, Dec 12	Thu, Dec 18	0				
1.5.7	Retention payment released 30	0	Fri, Dec 19	Thu, Jan 15	130000				
1.5.8	Hold Ribbon Cutting Ceremony (li...	0	Fri, Jan 16	Fri, Jan 16	5000				
1.5.9	Clean-up File and closeout project	0	Mon, Jan 19	Wed, Jan 28	0				
1.5.10	Project Completed	0	Thu, Jan 29	Thu, Jan 29	0				

Step 4 - Build Budget Cash Flow Curves



(This project is currently running under budget.)

Step 5 – Track and Report Progress

Public Works - Microsoft Internet Explorer

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Log Out Team: LBRA - Public Works

Home Projects Documents Baselines

Tasks Documents Baselines

New Task... Edit Assign

View Quarters Show Gantt


Active Projects : Public Works

#	Task	%	Work Days	Assigned To	Predecessors	2008	Q2 2008	Q3 2008	Q4 2008	Q1 2
<input type="checkbox"/> 1.3.1	Prepare Bid Documents	100	9 days	1.2.24	0 0					
<input type="checkbox"/> 1.3.2	Advertise For Bid	100	1 day	1.3.1	0 0					
<input type="checkbox"/> 1.3.3	Contractors prepare Bids	100	20 days	1.3.2	0 0					
<input type="checkbox"/> 1.4	PHASE 4 – AWARD	100	93 days		0 0					
<input type="checkbox"/> 1.4.1	Open Bids	100	1 day	1.3.3	0 0					
<input type="checkbox"/> 1.4.2	Select lowest responsive bidder	100	1 day	1.4.1	0 0					
<input type="checkbox"/> 1.4.3	Staff Report	100	5 days	1.4.2	0 0					
<input type="checkbox"/> 1.4.4	Agency or City Approval Process	100	20 days	1.4.3	0 0					
<input type="checkbox"/> 1.4.5	Award Bid Through Either Agency	100	20 days	1.4.4	0 0					
<input type="checkbox"/> 1.4.6	Letter to contract or with contract	100	1 day	1.4.5	0 0					
<input type="checkbox"/> 1.4.7	Contractor returns executed	100	20 days	1.4.6	0 0					
<input type="checkbox"/> 1.4.8	Agency executes contract and	100	5 days	1.4.7	0 0					
<input type="checkbox"/> 1.4.9	Pre-construction meeting	100	20 days	1.4.8	0 0					
<input type="checkbox"/> 1.5	PHASE 5 – CONSTRUCTIONS	46	150 days		0 0					
<input type="checkbox"/> 1.5.1	Construction Initiated	100	40 days	1.4.9	0 0					
<input type="checkbox"/> 1.5.2	Construction Midway	50	40 days	1.5.1	0 0					
<input type="checkbox"/> 1.5.3	Construction Completed (last third)	0	35 days	1.5.2	0 0					
<input type="checkbox"/> 1.5.4	Manage / Oversee construction	50	120 days	1.4.9	0 0					
<input type="checkbox"/> 1.5.5	Contractor Invoices & Request	50	120 days	1.4.9	0 0					
<input type="checkbox"/> 1.5.6	Certificate of Completion Records...	0	5 days	1.5.3	0 0					
<input type="checkbox"/> 1.5.7	Retention payment released 30	0	20 days	1.5.6	0 0					
<input type="checkbox"/> 1.5.8	Hold Ribbon Cutting Ceremony (if ...	0	1 day	1.5.7	0 0					
<input type="checkbox"/> 1.5.9	Clean-up File and closeout project	0	8 days	1.5.8	0 0					
<input type="checkbox"/> 1.5.10	Project Completed	0	1 day	1.5.9	0 0					

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Start Board Presentation.ppt Public Works - Micros... 12:26 PM

Step 6 – Post Summary Schedule on Agency Web Site for Public Viewing

Viewpath  Log Out Team: **LBRA - Public Works**

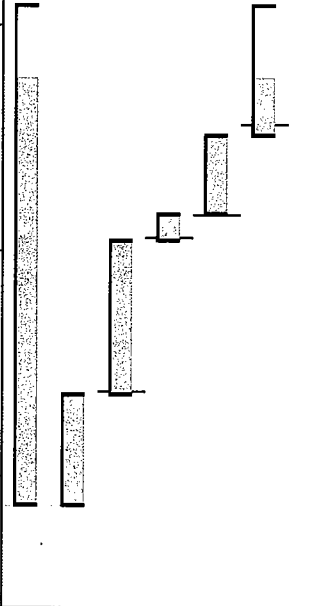
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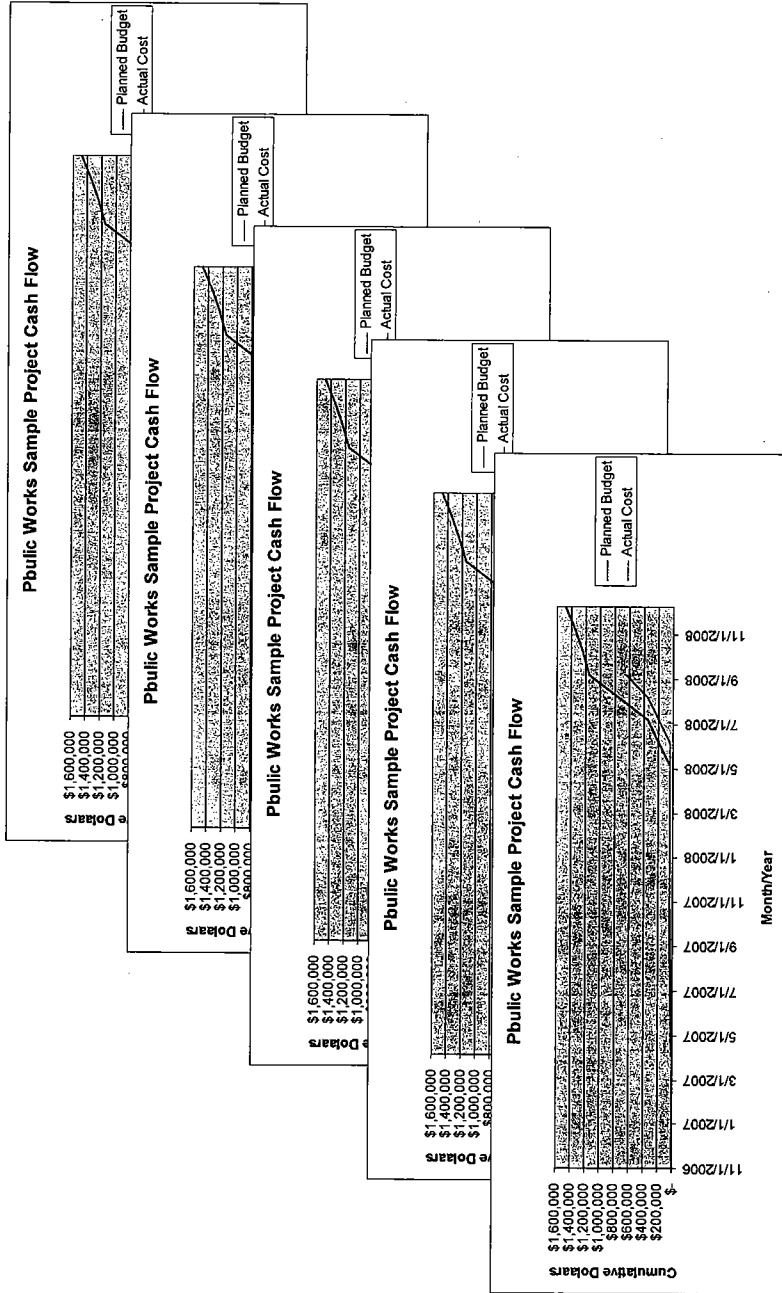
Active Projects : **Public Works** [Export](#) [Print](#)

#	Task	%	Work Days	A 2006	2007	2008	2009	2010
<input type="checkbox"/>	Public Works	86	579 days					
<input type="checkbox"/>	PHASE 1 - CONCEPT	100	129 days					
<input type="checkbox"/>	PHASE 2 - DESIGN	100	177 days					
<input type="checkbox"/>	PHASE 3 - ADVERTISE	100	30 days					
<input type="checkbox"/>	PHASE 4 - AWARD	100	93 days					
<input type="checkbox"/>	PHASE 5 - CONSTRUCTIONS	46	150 days					



(This project is about 50% complete with the construction phase.)

Step 7 – Aggregate Planned Projects for Agency-wide Budget Projections



Conclusion

- **Template Population – 3 to 4 weeks**
- **Evaluation – 6 weeks**
- **Improvement – 8 to 12 weeks**
- **Replication – 8 to 12 weeks**