


VIRGINIA DEPARTMENT OF TRANSPORTATION

**CONSTRUCTION DIVISION (CD)**

**INSTRUCTIONAL AND INFORMATIONAL MEMORANDUM (IIM)**

<b>GENERAL SUBJECT:</b>  DASHBOARD PROJECT DELIVERY MILESTONES	<b>NUMBER: IIM-CD-2018-03.01</b>
<b>SPECIFIC SUBJECT:</b>  GUIDELINES FOR DETERMINATION AND MANAGEMENT OF DASHBOARD PROJECT DELIVERY MILESTONES	<b>DATE: SEPTEMBER 14, 2018</b>
	<b>SUPERCEDES: IIM-CD-2018-01.01</b>
<b>DIVISION ADMINISTRATOR APPROVAL:</b>   Kerry A. Bates, P.E. <b>STATE CONSTRUCTION ENGINEER</b>	

**EFFECTIVE DATE**

This Instructional and Informational Memorandum (IIM) is effective for contracts executed on or after July 1, 2018.

**BACKGROUND**

The intent of the Project Delivery Dashboard is to provide a predictive, transparent tool for the public and VDOT to track the on-time and on-budget delivery of construction projects. In order to improve upon the existing Dashboard requirements, Dashboard 4 will require project delivery interim milestones to be entered, and routinely updated in SiteManager. This SiteManager data will then be publically reported through Dashboard 4.

The use of interim milestones is not required for pavement overlay, schedule overlay, schedule contracts, on-call and/or renewable contractors, or for contracts that have a duration of 6 months or less.

## **DETERMINATION OF DELIVERY MILESTONES AND COMPLETION DATES**

Following contract execution, District construction personnel will enter the original contract completion date into SiteManager's milestone module.

Contract specific interim milestones will be established, named, and entered into SiteManager as Original Milestone Completion dates (i.e. planned completion dates) by the District Construction Engineer or their designee, to track the progress of the project. This shall occur when VDOT approves the contractor's baseline schedule. These interim milestones *may or may not* be tied to contractually binding requirements/dates. Any major traffic switches, alignment changes or detours should be noted as original interim milestones. Additional interim milestones may include but are not limited to:

- Phase or stage completion
- Major item of work completion
- Project specific key events
- Completion of bridges
- Completion of subsurface work activities
- Approval of shop drawings

Interim milestone names should explicitly describe the specific event associated with the milestone, and be easily understood by the general public. For example, "Traffic switch onto new bridge lanes" is preferred and more descriptive than "Phase 3 switch." If no interim milestones are applicable to the project, none will be required for entry into SiteManager.

The requirements for interim milestone entry apply to Design-Bid-Build, Design-Build and all other contracts that use SiteManager. Interim milestones for Design-Build projects may include the completion of design activities, completion of right-of-way activities, and completion of utility relocations.

## **STATUS UPDATES OF DELIVERY MILESTONE DATES**

The District Construction Engineer or their designee, will be responsible for entering status updates into SiteManager to reflect the related *Work Start* date and *Actual Completion* date pertaining to interim milestones. Upon actual milestone completion, the *Actual Completion* date should be entered. In addition, a placeholder must be established for the *Work Start* date in the module that is prior or equal to one day before the *Actual Completion* date.

## **BUSINESS RULES**

Original interim Milestone Completion dates will be locked at the time they are entered/saved in SiteManager. The District Construction Engineer or their designee may formally request changes to these locked original interim milestone dates. The request shall be submitted to the State Project Controls Engineer for review and approval. If approved, these revised dates will be entered into SiteManager as the *Current Milestone Completion* date.

Project Delivery on-time status will be determined based on the status of the most recent actual interim milestone condition. These conditions will be updated continuously until final completion of the project.

Please visit the Dashboard 4 User Guide for business rules governing green, yellow or red metrics for project status.