

6 October, Nationals Park, Washington DC

TYLin

Challenges and Lessons Learned from Establishing Schedule Review and Monitoring Process in a Public Organization

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2022

Background of the Case Study

- In Spring 2021, an Owner/Agency had

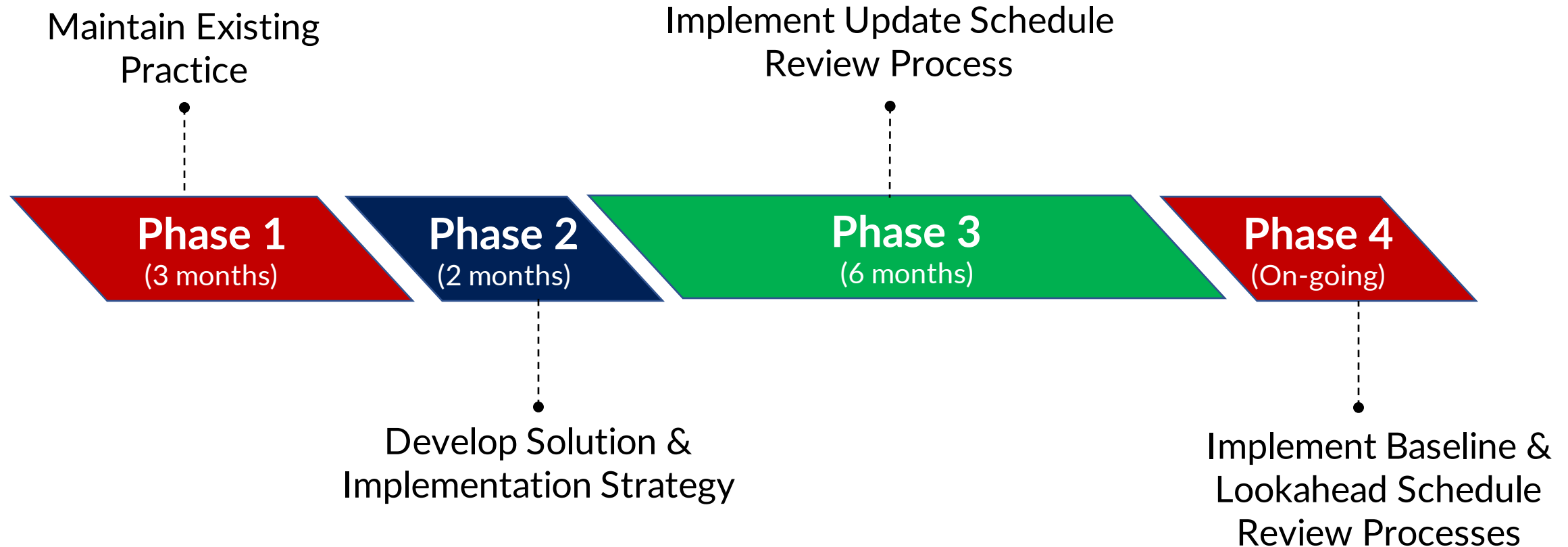
>50%
projects are
delayed

Schedule
review
issues

Not actively
use
scheduling

- **Owner/Agency's Goals**
 - Clear backlog of schedule reviews
 - Slow down/recover project delay
 - Culture change to a proactive schedule control procedure

Timeline to Implement the New Scheduling Procedure



Phase 1 – Fit-in and Minimize Disruption Phase (3 Months)

Challenges

- Build trust with agency's project managers.
- Catch up with the overdue schedule reviews.

Action

- Understand & maintain existing schedule management procedure.
- Dedicated staffing of junior and senior schedulers (appointed scheduling manager as the point of contact).
- Work overtime

Results

- Clear backlog of all schedule reviews (including the revisions).

Phase 2 – Develop Solutions & Implementation Strategies (2 Months)

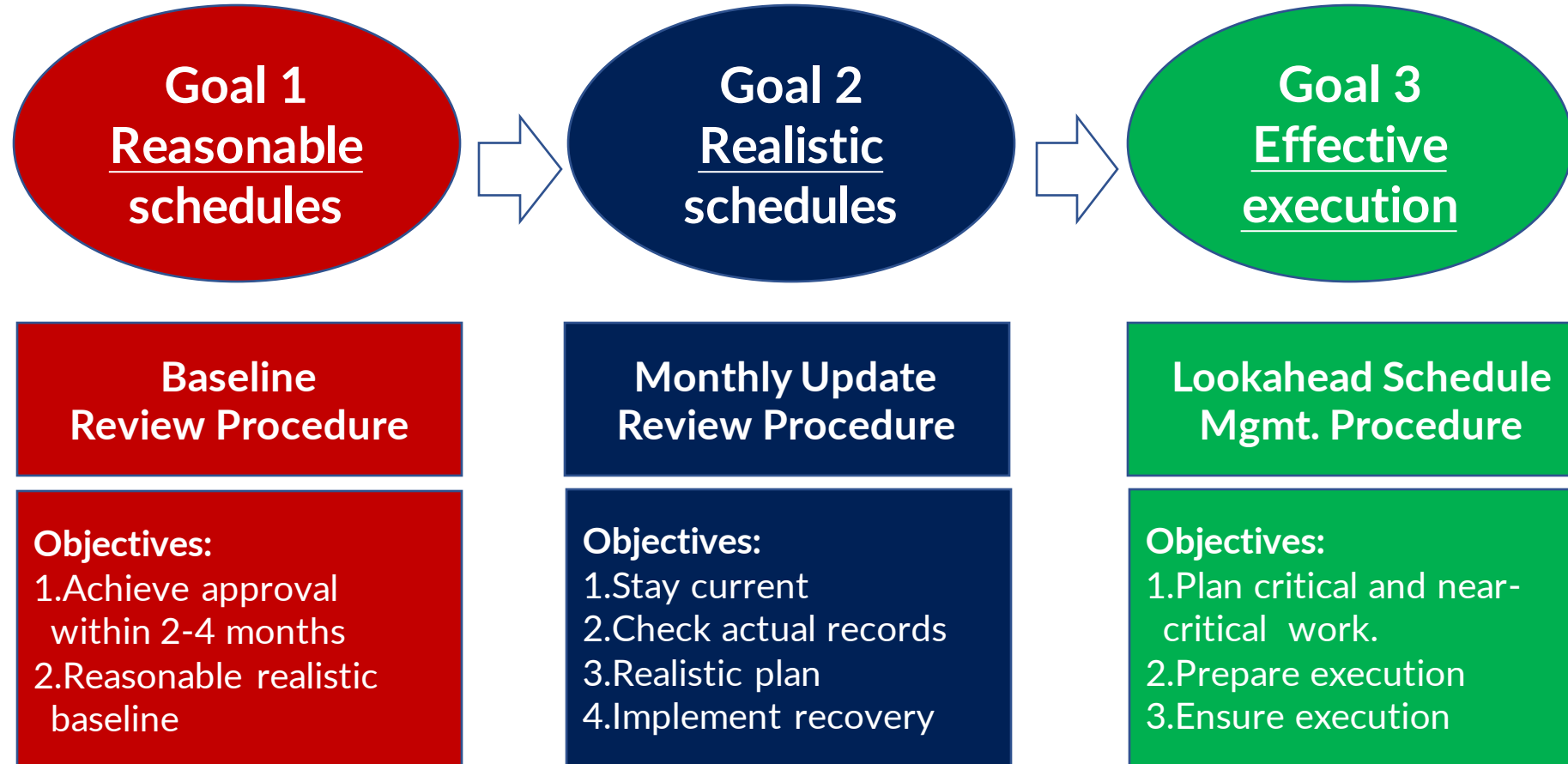
Challenges

- The baseline taking long (3 to 7 months) to develop and approve.
- The monthly update submissions falling 2 to 4 months behind.
- Critical path work not executed as planned.
- Reluctant to use scheduling to manage the project.
- The agency underestimated the staffing needs.

Action

- Developed framework of schedule review & monitoring process.
- Implementation strategy
- Performance matrix to evaluate the implementation.

What to implement (New Schedule Management Framework)?



How to Implement (Strategy)?

Biggest Challenge

Change Org. behavior

Solution

Build trust in team

Action

Slow down, stop & mitigate the delay

Strategy

Phase 3: update schedule

Phase 4: baseline & lookahead

How to Evaluate Implementation (Daily Planning & Check)?

No.	Description	Measurement Unit	Target
1	Duration to complete schedule review report (Step 1)	Calendar Days	<10 CDs
2	Duration to conduct internal review meeting (Step 2)		
3	Duration to conduct external review meeting (Step 3)		
4	[Schedule submission date - data date]	Calendar Days	<10 CDs
5	Quantity of mitigation planning meetings	Times	N/A
6	Project delays in schedule updates	Calendar Days	N/A
7	Duration for schedule re-submission	Calendar Days	<7 CDs

Phase 3 – Implement Update Schedule Review Process (6 Months)

- By implementing new schedule update review procedure, checklist, and reporting.
 - Step 1 – perform monthly update schedule review.
 - Step 2 – conduct internal schedule review (action items for owner).
 - Step 3 – conduct external schedule review (action items for contractor).



Goal 1
Reduce schedule
review duration

Goal 2
All monthly updates
are current

Goal 3
Slow-down or
recover delay

Phase 3 (continuous)

Challenges

- Using more part-time schedules to support schedule reviews.
- Visit construction sites.
- Interact more with the project managers.
- Daily planning and performance evaluation.

Results

- All projects' schedule updates stay current.
- The review duration reduced from 15-45 CDs to 7-10 CDs.
- 70% projects conducted internal and external discussions.
- The delay slowed down and recovery being implemented.
- Project managers provided good feedback.

Phase 4 – Implement Baseline & Lookahead Schedule Review Processes (Ongoing)

Challenges

- The baseline schedules taking a long time (3 to 7 months) to develop, review, and approve.
- Some projects see continuous delays in the monthly update schedules.

Action

- Implement structuralized baseline review procedure.
- Implement structuralized lookahead schedule management procedure for effective execution.

Results

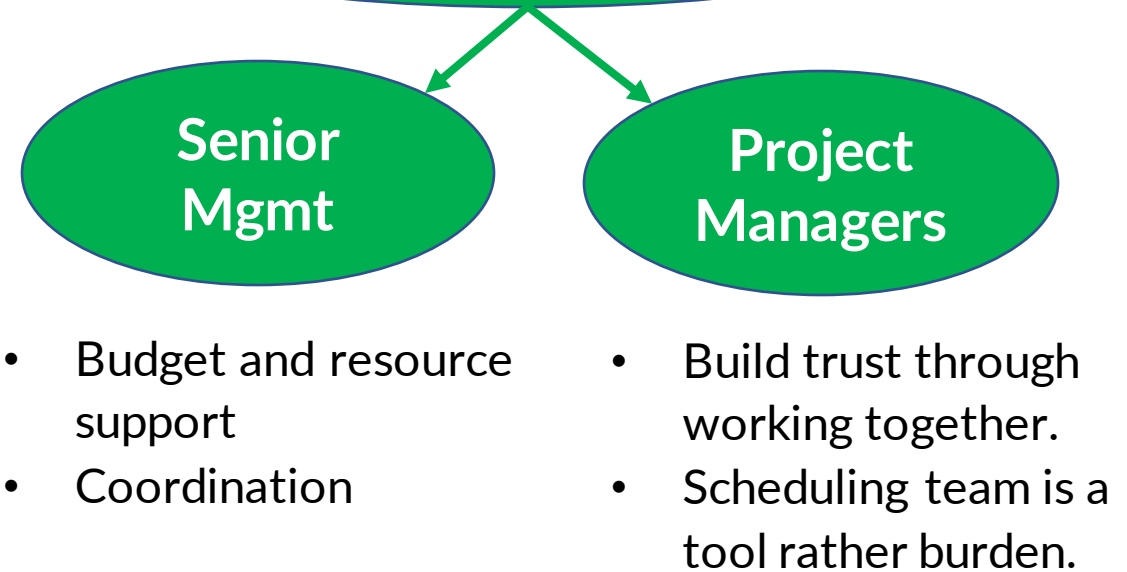
- Being implemented and results to be shared.

Conclusion (Key Factors to Successful Implementation)

Implementation Team

- Schedulers with strong analysis and communication skills.
- Detailed implementation plan
 - New schedule review & management framework and procedure
 - Implementation strategy
 - Daily planning and evaluation
- Sticking with the goals but be flexible with the approaches.

Public Organization





THANK YOU