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Surviving the Pandemic by Applying the Correct Project Controls Model

 **Project Controls**
EXPO
Washington, DC - USA

(W)www.projectcontrolexpo.com/usa (M) +44 (0) 203 883 1386 (E)usa@projectcontrolexpo.com

2022

Rev. Dr. Courtney Lackard, DMin, CCP, PSP, CSL

- Director of Project Controls, Massachusetts Bay Transportation Authority (MBTA)
 - Department of Capital Program Support
- Certifications:
 - PSP: Planning & Scheduling Professional – AACE International
 - CCP: Certified Cost Professional – AACE International
- Licenses:
 - CSL: Construction Supervisor License, Massachusetts
- Education:
 - New York University Tandon School of Engineering, BS, Mechanical Engineering
 - Gordon Conwell Theological Seminary, Masters in Urban Ministries
 - Knox Theological Seminary, Doctor of Ministry Degree in Preaching and Teaching
- Over 35 years of experience in Project Controls/Cost Engineering in a wide variety of industry sectors, including schools, rail, government contracts, and airports.



Introduction



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Introduction

The pandemic resulted in a widespread shut down of practically every industry. Most transportation system nevertheless had to remain open to move essential workers to their workplace. During the same time, transportation capital projects continued with whatever slim workforce was available. Applying the correct Project Controls model played a key role in watching those projects from a distance and ensuring the survival of the system, thus resulting in the T (MBTA) applying many changes and modifications on the fly.

- The three-legged Project Controls Model
- Strong Scope Management results in success
- Schedule Management as a means of monitoring cost growth
- Cost Management keeps the model intact



Three-Legged Model



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Three-Legged Model

- One of the best models for Project Controls is the Three-Legged model.
- The three legs are Scope Management, Schedule Management, and Cost Management.
- Although there are other models available, maintaining the three-legged model provides better success in the completion of the project.
- Each component has their strong points.
- Each leg is dependent on the others.



Schedule Management



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Schedule Management

- On March 23, 2020, a directive was given that each project was required to establish a baseline schedule based on a data date of March 23rd
- Each project was required to report progress as of the end of that date
- A follow-on directive was given requiring each contractor to acknowledge impact in writing by a date certain
- The notifications were managed by the Covid - 19 Task Force and used in the analysis for equitable time
- A date certain was established to file any claim for impact via a Time Impact Analysis (TIA) for time impact and a Proposed Change Order for any cost impact
- The Construction Phase Project Controls consultant performed the initial TIA review and analysis



Schedule Management Cont'd

- After a review by the CPS Project Controls consultant, the Task Force finalized the review and provide a recommendation of excusable time
- A policy clarification was established for the proper categories for assessing time impact to the project:
 - Changes in the Works – Any change directive that introduces new scope, inclusive of RFIs
 - Excusable Delay – Any delay due to Force Majeure impact
 - Excusable Third-Party – Delay impacts as a result of an external entity
 - Non-Excusable – Delay impacts as a resulting from the contractor's initiative
- The Change Management Department determined any cost due to changes in the works



Scope Management



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Scope Management

- There was a freeze in Operations Support at the start of the shutdown.
- No changes were initiated until after the site was reopen.
- An Estimate At Completion was established based on progress as of March 23rd
- A Covid-19 Task Force was established utilizing an independent consultant
 - The Task Force determined scope of any changes to provide equity.
 - The Task Force distinguished what scope fell under the force majeure requirement
 - Equitable time was awarded by recommendation of the Task force



Scope Management Cont'd

- Reopened construction sites on a date in mid-June
 - Established a new scope for cleaning requirements
 - Additional management for contact tracing
- Each day of delay was recorded along with the reason for the delay
- Each delay is compared with the status of the project established on March 23, 2020



Cost Management



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Cost Management

- Any changes experienced by the Scope and Schedule managements resulted in changes to Cost Management
- Change orders were written based on the baseline establish on March 23rd
- Manage Estimate at Completion
 - Request that contractors submit a Sworn Statement of Account with each invoice
 - Reduce turn-around time on each payment requisition
 - Establish a standardized payment process
- Increased project cost reporting



Conclusion



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Conclusion

- There may be many models of project manage, and simple is better
- A baseline in scope, cost, and schedule can help any project navigate a pandemic of any sort
- Once a plan is established, stick with it.
- Project Controls does work to keep the project on time and within budget





THANK YOU

