

Internal Scope of Work Agreement Management

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Document Owner: Chief Engineer

1. Scope

This process applies to the management of a specific project Internal Scope of Work Agreement between a WSDOT Specialty Group and the Project Office after agreement execution. This process is a complement to the Internal Scope of Work Agreement Management Process Map.

2. Purpose

This document establishes a WSDOT standard methodology for the management of and Internal Scope of Work Agreements.

3. Roles and Responsibilities

The identified roles are provided as a guide to assigning the tasks included in the PMRS processes. Each region has the flexibility to delegate the role of Project Manager (and other functions) to the appropriate functional level to meet project and project office needs and to accommodate current and planned organizational structures.

A WSDOT Specialty Group may move to the role similar to the Regional PE/PM for a given portion of the project. Specialty Groups always report back to the overall PE/PM when supporting project delivery.

3.1 Project Engineer/Project Manager

- Execute Agreement Development Process.
- Manage project scope, schedule and budget.
- Manage work plan and assigned resources to complete agreed upon project work.
- Review and comment on Specialty Group or Consultant progress reports.
- Initiate Close-Out Process when appropriate.

3.2 Specialty Group Manager

- Manage work plan and assigned resources to complete agreed upon project work.
- Perform work per agreement.

- Prepare and submit monthly progress reports to the Project Engineer /Project Manager.
- Manage the work of any external consultants.

4. Internal Scope of Work Agreement Management Process Steps

The following process steps are taken from the Agreement Management Process Map. The sub-numbers listed below correspond to the numbered activity on the process map. For example, item 4.1 corresponds to activity 1 of the process map.

- 4.1 Internal Scope of Work Agreement Development
Project Engineer/Project Manager/Specialty Group Manager:
 - Develop and execute agreement per Internal Scope of Work Agreement Process.

- 4.2 Review Work Plan and Assign Resources
Specialty Group:
 - Review work plan and assign resources needed to complete agreement.

- 4.3 Perform Work
Specialty Group:
 - Perform work according to agreement.
 - See Schedule and Cost Management Process

- 4.4 Changes to Scope, Schedule or Budget?
Specialty Group:
 - Identify potential changes to project scope, schedule or budget.
 - Initiate Internal Scope of Work Agreement Change Management Process, as necessary.

- 4.5 Prepare Monthly Progress Report
Specialty Group:
 - Prepare monthly progress report showing progress completed relative to planned performance.
 - At a minimum, progress report shall include:
 - Status on project scope schedule and budget including potential changes to any
 - Estimate at completion
 - Outstanding expenditures
 - Accomplishments for monthly reporting period
 - Planned activities for upcoming month or longer, as needed
 - Risk update and identification of new risks
 - Issues and concerns
 - See Progress Reporting Guidelines

- 4.6 **Determine Costs to Date**
Specialty Group:
- Determine costs spent to date for project according to the Cost to Date Tracking Process.
 - Prepare progress report including cost and progress to date.
- 4.7 **Submit Progress Report and Costs to Date for Review & Approval**
Specialty Group:
- Provide cost and schedule status reports for review and approval by the Project Engineer/Project Manager.
- 4.8 **Meets Requirement?**
Project Engineer/Project Manager:
- Review progress report.
 - Determine if it meets project and contract requirements.
 - Request revision and resubmittal as necessary.
- 4.9 **Change Management Needed?**
Project Engineer/Project Manager:
- Determine if changes to project scope, schedule or budget are necessary based upon progress to date.
 - Initiate the Internal Scope of Work Agreement Change Management Process, as necessary.
- 4.10 **Is the Agreement Complete?**
Project Engineer/Project Manager:
- Confirm if all agreement work has been completed.
 - Determine if it meets project requirements.
- 4.11 **Close-out Agreement**
Project Engineer/Project Manager:
- Close out Internal Scope of Work Agreement when all work is complete.
 - Finalize documentation to close the agreement in the PMRS tools (if documented in the tools).
 - Party managing the agreement is responsible for closeout.
- 4.12 **Revise and Resubmit**
Specialty Group:
- Revise and resubmit monthly progress report to address issues identified by the Project Engineer/Project Manager.
- 4.13 **Agreement Change Management**
Project Engineer/Project Manager/Specialty Group Manager:

- Initiate the Internal Scope of Work Agreement Change Management Process, as necessary to address proposed changes to project scope, schedule and budget.

5. Term

This standard is effective immediately upon signature and continues in force until modified in writing by the Chief Engineer, or his/her designee.

6. Exemptions

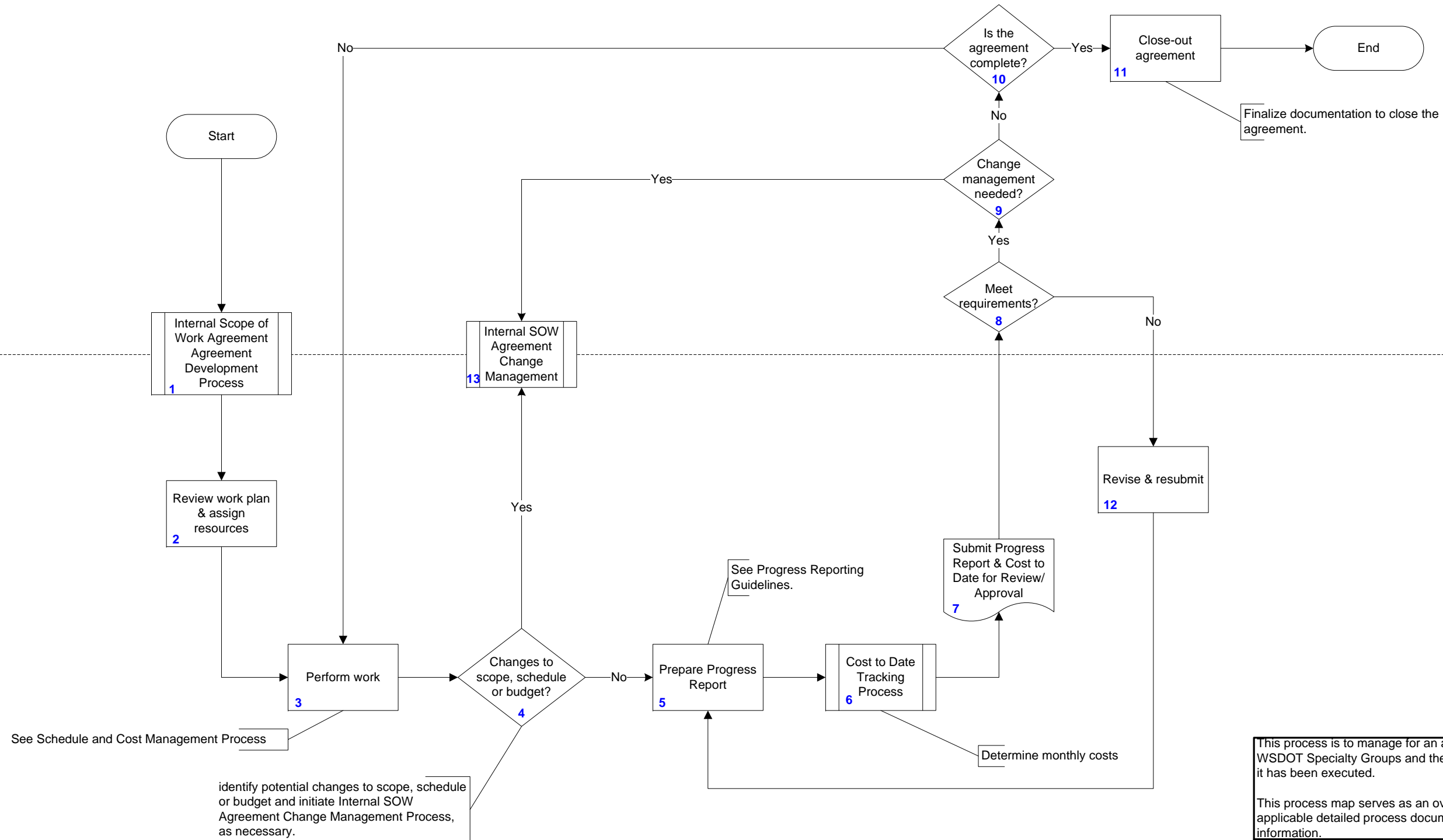
Variance from this process requires approval of the Chief Engineer, or his/her designee.

7. References

- 7.1 Executive Order Number: E 1032.01 – Project Management, July 1, 2008
- 7.2 Executive Order Number: E 1042.00 – Project Management and Reporting System, July 1, 2008
- 7.3 Project Management Web Portal. Copies of all PMRS policies, processes, procedures and guidance documents are available here: <http://wwwi.wsdot.wa.gov/Projects/PMRS>
- 7.4 Internal Scope of Work Agreement Management Process Map
- 7.5 Internal Scope of Work Agreement Change Management Process and Map
- 7.6 Internal Scope of Work Agreement Development Process and Map
- 7.7 Cost to Date Tracking Process and Map
- 7.8 Sample Monthly Progress Report (available on the PMRS Web Portal)

Project Engineer/Manager (PE/PM)

Specialty Groups



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