Parsons Brinckerhoff, Inc.

# Section 7 – Project Reviews

## Project Delivery Basic Training

February 2011

# Objectives

- Describe the three levels of project review
  - Standard period review / PM evaluation – PD 205 – 02 PM Evaluation Report
  - Projects with exceptional conditions
  - Project Peer Review (PPR)

# Standard Period Review / PM Evaluation Report

- Performed by the Area Manager or his/her designee
- Monthly – quarterly as a minimum
- Maintain a log of action items

# Standard Period Review / PM Evaluation Report

## PM Evaluation Report/Project Status

Project Manager :
All Project Numbers that PM is Managing for Calendar Year(s) _____

| | | CY___ => | | | | CY___ => | | | | Average | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Performance Measurement** | **Pd 1** | **Pd 2** | **Pd 3** | **Pd 4** | **Pd 1** | **Pd 2** | **Pd 3** | **PD 4** | **Rating** | **Comments** |
| 1 | PMP and Risk Management Plans complete and updated | | | | | | | | | #DIV/0! | |
| 2 | Scope, Schedule and Budget established and updatec | | | | | | | | | #DIV/0! | |
| 3 | Percent completes up to date | | | | | | | | | #DIV/0! | |
| 4 | Contract mods up to date or in process | | | | | | | | | #DIV/0! | |
| 5 | Timely invoicing and collections | | | | | | | | | #DIV/0! | |
| 6 | Quality Control Plans are in place and implementec | | | | | | | | | #DIV/0! | |
| 7 | Client Relationship Status and Business Development activitie: | | | | | | | | | #DIV/0! | |
| 8 | Task budget agreements in place | | | | | | | | | #DIV/0! | |
| 9 | Project margin inception to date | | | | | | | | | #DIV/0! | |
| | Total | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | #DIV/0! | |
| | Average rating | #DIV/0! | #DIV/0! | #DIV/0! | #DIV/0! | #DIV/0! | #DIV/0! | #DIV/0! | #DIV/0! | #DIV/0! | |

**Rating Criteria Scale: 5 highest- 2 lowest**

- 5 - Exceeds
- 4 - Achieved
- 3 - Partially Achieved
- 2 - Not Achieved

Individual Project Comments:

# Projects with Exceptional Conditions

| Item to Examine | Condition to Warrant Review |
|---|---|
| Budget resulting in a loss (Cost Budget > Revenue Budget) | Anytime |
| Variance between revenue model & PBIS budget | Anytime |
| Single period margin erosion | > $10K or > 10% |
| Fiscal year margin erosion | > $50K or > 20% |
| Burdened unbilled cost | > 28 days or > $20K |
| Delinquent accounts receivable | > 70 days or > $50K |
| Accounts Receivable multiplier | > 5 |
| Performance ratio | < 0.80 |

# Project Peer Review (PPR)

- Done at the request of
  - Project Manager
  - Area Manager
  - Regional Project Operations Manager
  - Group Manager
  - Director of Projects
- PIC is Team Leader or his/her designee
- PM is an active participant
- Client feedback is a key element
- Key members of the Project Delivery Team perspective
- PPR Report – PD 205-01, Rev 2

# Project Peer Review (PPR) Elements

- Effectiveness of start-up
- Safety, quality of operations
- Financial performance, cost to complete analysis
- Contract/mods/sub-contract status
- PM performance
- Career development opportunities on the project
- Project organization
- Risk management
- Implementation of project control systems
- Methods for controlling project scope
- Document control systems
- Client feedback data
- Project admin, PBIS reports and invoicing status/ procedures
- Project review actions
- Identification of project deliverables and status

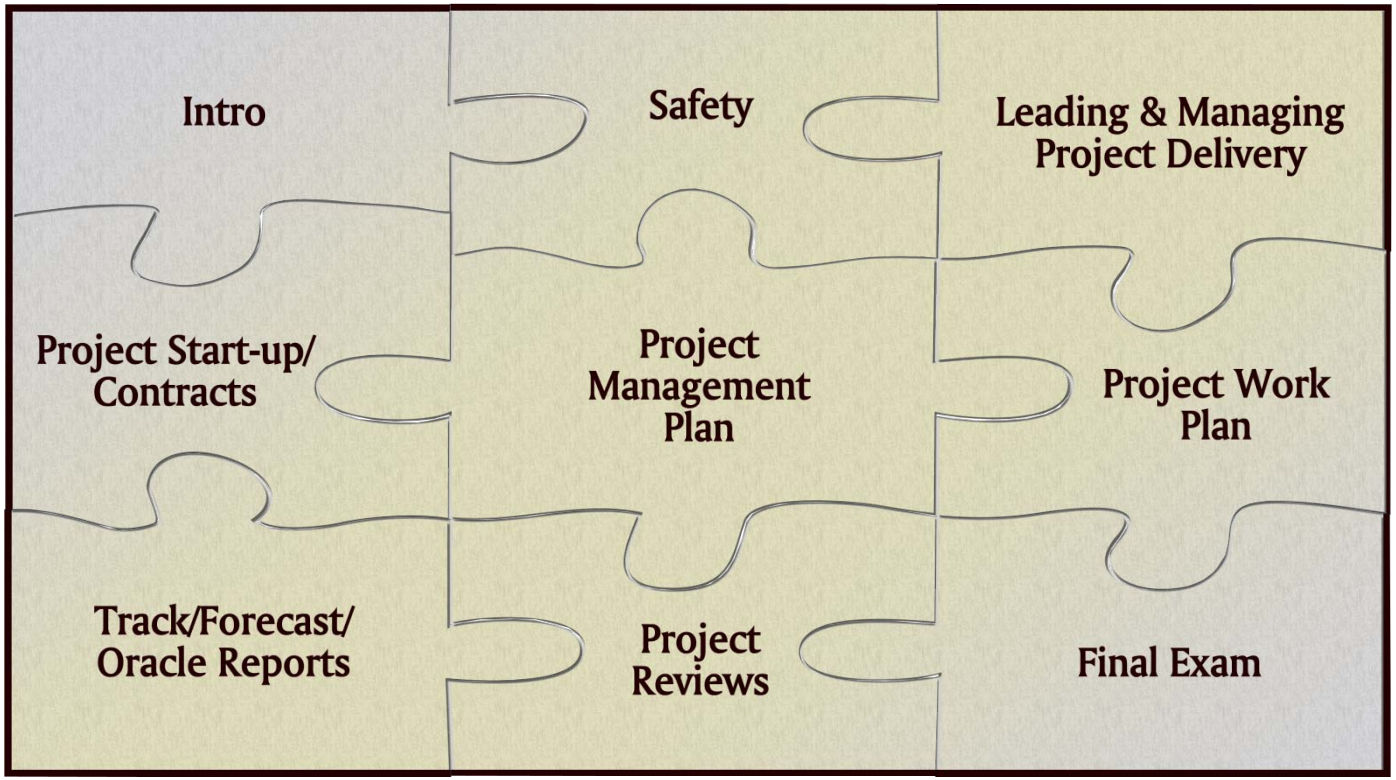
# Summary

- Three levels of project review
  - Standard period review / PM evaluation
  - Projects with exceptional conditions
  - Project Peer Review (PPR)

# Reference Documents and Additional Training

- Business Management System (BMS)
  - PD 205 Project Reviews
  - PD 205-01 Project Peer Review Template
  - PD 205-02 PM Evaluation Review / Project Status
  - PD 206 Technical Reviews & Project Verification

# Agenda


Intro
Safety
Leading & Managing Project Delivery
Project Start-up/ Contracts
Project Management Plan
Project Work Plan
Track/Forecast/ Oracle Reports
Project Reviews
Final Exam