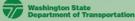


Project Delivery Method
Selection Guidance

Selection Matrix:
Probable PDM

January 15, 2016
WSDOT Construction Division



Determining Probable PDM

Sequential tasks in the Matrix needed to determine Probable PDM:

- Pre-Work
- Selection Process Requirements
- Selection Process Timing
- Selection Matrix
- Probable PDM Endorsement Process



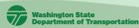
Pre-Work Prior to Determining the Probable PDM

- Be thoroughly familiar with the Project Delivery Method Selection Guidance (PDMSG);
- PDM Attribute Comparison Spreadsheet – review the pros and cons of the three project delivery methods as they relate to different project attributes.
- Review Appendix B - Pre-Work
- Review Appendix D - How to Complete the Selection Matrix



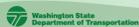
Pre-Work

- Develop/review the initial Project Summary Package, including or expanded as follows:
 1. Project Description and attributes such as scope, schedule and budget (reference the Project Description Worksheet as an additional tool).
 2. Project Commitments, Decisions and Assumptions.
 3. Project Goals and Constraints.
 4. Preliminary Risk Assessment (reference the Risk Assessment Guidance in Appendix A as an additional resource).



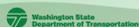
Project Commitments, Decisions and Assumptions

- **Project Commitments:** Know commitments and limitations to the project that may affect Project scope, risks, budget or schedule.
- **Project Decisions:** Decisions that cannot be changed due to funding source, project approval, Legislative mandate or other sources that may effect project scope, risks, budget or schedule.

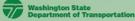


Project Commitments, Decisions and Assumptions

- **Project Assumptions:** A deduction based on incomplete Project information that may affect Project scope, risks, budget or schedule if there are changes.



Questions?



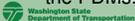
Project Goals

- What additional Project Goals (if any) are needed on the Project Delivery Description Worksheet?
- What goals would contribute to project success?



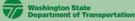
Project Delivery Goals

- Project Delivery Goals are goals related to the characteristics of the PDMs.
- A Project Goal may be identical to a Project Delivery Goal or it may have a related goal determined by the Project Goal specifics, causes or risks;
- Project Delivery Goals are a refinement of the Project Goals and are used to evaluate the ability of the PDMs to meet the Project Goals based on the characteristics of the PDMs.



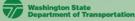
Weigh Project Delivery Goals

- Use 10 (highest) to 1 (lowest) to indicate the relative importance of your goals to achieving a successful project.
- Pick out the Goal you consider most important and assign it a 10;
- Evaluate each Goal by comparing it to your highest weight Goal;
- Continue until all Goals are weighed.



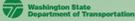
Neutral Goals

- A Neutral Goal is a Project Goal that has the same rating for each proposed PDM in the Selection Matrix;
- These would be goals that have the same relative ability to be achieved, regardless of the PDM.



Project Constraints

- Constraints differ from Project Goals in that they MUST be accomplished for project success;
- Evaluate the Highest Priority Project Goals ("10's") to determine if any are constraints;
- Project Commitments and Decisions may create "Constraints";
- Constraints are not scored, they are Pass/Fail when evaluating a PDM's ability to meet the Goal.
- Constraints tend to be rare in this process.



Project Risks

- Preliminary Risks should be identified in the Project Summary Package;
- Utilize the resources on the WSDOT Risk Assessment webpage <http://www.wsdot.wa.gov/Projects/ProjectMgmt/RiskAssessment/> and/or Appendix A.6- Typical Transportation Project Risks List, General Project Risks Matrix;
- Develop a Qualitative Risk Analysis



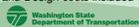
Questions?

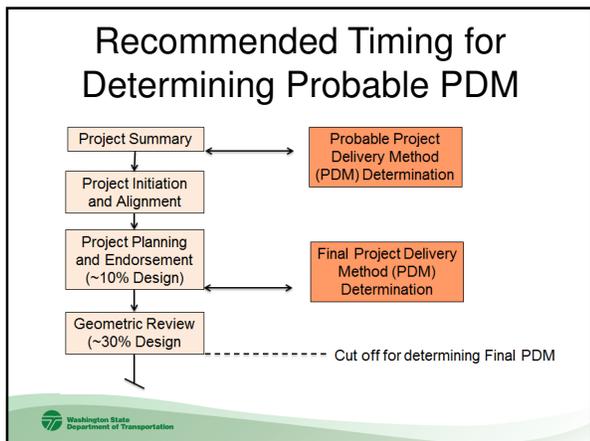


Probable PDM Selection Process Requirements

Estimated Project Cost	Required Process
<ul style="list-style-type: none"> • Less than \$2 Million (contract cost*) 	Part I and IV of Selection Checklist
<ul style="list-style-type: none"> • Equal to or greater than \$2 Million* but less than \$25 Million 	Part I, II, III and IV of Selection Checklist
<ul style="list-style-type: none"> • \$25 Million or greater, or • Parts II and III of the Checklist does not determine a Probable PDM 	Selection Matrix

*This limitation relates to Design-Build Contracts so the estimated contract cost includes Construction and Design costs included in a potential DB contract. Project Cost is used in all other cases.





Project Summary Package

- The Probable PDM determined by the Project Engineer shall be included in the Project Summary Package.

The Washington State Department of Transportation logo is located at the bottom left of the text box.

Participation

- Project Engineer or Program Management staff assigned the Project Summary of the project.
- Supporting staff.
- Construction Project Engineer will consult if assigned.

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Probable PDM Determination Selection Matrix

- Review Project Summary Package and other project information including scope, schedule, and budget.
- Project Delivery Description Worksheet.
- Project Goals and priorities.
- Project Constraints.
- Qualitative Risk Analysis.



Probable PDM Determination Selection Matrix

Appendix D - How to Complete the Selection Matrix

Project Attributes	
Project Name:	
Project #: Bridge Replacement Project and HOV Connector	
Location:	
Local ID:	
Project Goals:	
Business Objectives:	
Business Impacts to the traveling public and local municipality (businesses)	
Business Development Impact:	
Maintenance Operations and Maintenance costs:	
Timeline and Project Constraints that affect the selection of the PDM:	
Estimated Budget:	\$25,000,000
Estimated Start/End Schedule:	
Completion Date (if known):	
Regional Project Completion or Milestone Dates (if applicable):	
Must complete Milestone for part of project to allow Project 1 project to start (if known):	
Source(s) of Project Funding:	Transportation package
Project Consider:	
Major Features of Work - (trestle, bridge, sound barrier, etc.):	Bridge replacement and HOV connector
Major Schedule Milestones:	Complete Project by 8/15/2016
Major Project Stakeholders:	Municipality B
Major Obstacles (to be avoided):	Financial impact and public agreement with Municipality B to allow hold up design (project design to be completed before execution of the agreement)
Major Obstacles with Budget, Schedule, and/or Environmental Approvals:	Public may require a complete Environmental Review
Other:	Delay on HOV's not expected
Major Obstacles during Construction Phase:	Complete signage and graphics to provide access to Municipality B Businesses
Other:	Complete signage and graphics to provide access to Municipality B Businesses

Comment (C17): The selection of Project 1 PDM option is based on the project constraints which, Project 1 cannot be approved without meeting the public business, transportation, and maintenance objectives. The selection of the PDM option is based on the project constraints which, Project 1 cannot be approved without meeting the public business, transportation, and maintenance objectives. The selection of the PDM option is based on the project constraints which, Project 1 cannot be approved without meeting the public business, transportation, and maintenance objectives.

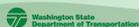
Comment (C18): It is confirmed that an Environmental Review is required. The project is a bridge replacement and the new bridge is of the same size and span. The project is a bridge replacement and the new bridge is of the same size and span.

Comment (C19): The project is a bridge replacement and the new bridge is of the same size and span. The project is a bridge replacement and the new bridge is of the same size and span.



Probable PDM Determination Selection Matrix

- Identify Project Goals in the matrix.
 - Eliminate provided Goals that do not apply to the project, are secondary, or are neutral.
 - Clarify the language of the provided Project Delivery Goals to be project specific.
 - Add new Project Delivery Goals, if needed



Selection Matrix Goals

Pass/Fail Constraints	Project Delivery Goals
	Schedule
	Minimize project delivery time
-	Meet a specific critical milestone or completion date
-	Utilize (federal) funding by a certain date
-	Effectively manage weather, environmental and/or other construction windows
	Funding limitations impacts ability to compress the schedule and/or contract all the work early in the process (such as the biennium, grants, etc)
	Cost/Funding
-	Minimize project cost (typically considered neutral)
-	Complete the project on budget (typically considered neutral)



Selection Matrix Goals

Function/Innovation
Minimize maintenance and operations costs (assume maintenance and operations is not part of DB contract)
Maximize capacity and mobility of improvements
Minimize impacts to the public and/or local businesses during construction
Incorporate opportunities for innovation and efficiencies to meet specific requirements
Avoid or minimize impacts to the project through risk transfer and innovation (such as environmental risks)
Minimize project permanent area impact (footprint) (This would be project neutral unless the project is larger and more complex – then use the ratings ranges provided)



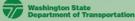
Probable PDM Determination Selection Matrix

- Identify Project Constraints, if any, and evaluate possible methods as pass/fail.
 - Cross out columns for PDM's that fail Constraints, and do not consider further



Probable PDM Determination Selection Matrix

- Weigh Project Delivery Goals
 - Relative importance to a successful project
 - Use established priorities, 10 (highest) – 1 (lowest), to evaluate relative importance.
 - Weigh any new Project Delivery Goals using the same process.



Project Delivery Goal Weights

Pass/Fail Constraints	Project Delivery Goals	Weight
	Schedule	
	Minimize project delivery time	10
-	Meet a specific critical milestone or completion date	-
-	Utilize (federal) funding by a certain date	-
-	Effectively manage weather, environmental and/or other construction windows	-
	Funding limitations impacts ability to compress the schedule and/or contract all the work early in the process (such as the biennium grants, etc.)	



Probable PDM Determination Selection Matrix

- Rate each PDM's relative ability to achieve the Goal with 10 (highest) -1 (lowest)
 - Review and adjust the rating for provided Project Delivery Goals
 - Develop ratings for new Project Delivery Goals



Probable PDM Approval Process

- If the Project contract cost is \$25 Million or more or an exception to the guidance is requested, then;
 - The Regional Administrator endorses the Probable PDM and submits it to HQ; and
 - The Assistant State Design Engineer and Assistant State Construction Engineer endorse the Probable PDM.
 - If the ASCE/ASDE do not endorse the Probable PDM, the Region will provide the additional information needed to gain the ASCE and ASDE endorsement.



Questions?