FDM 2-15-1 Project Integration Management *December 11, 2014*

1.1 Overview

Project Integration Management is the practice of making certain every part of the project is coordinated. Project management is an integrative undertaking requiring each project process to be appropriately aligned and connected with the other processes to facilitate coordination. The project manager is responsible for this coordination. Corporate supported project management tools must be used to prepare the project plan, record, manage and report project information.

The Project Management Plan includes documents of decisions regarding project scope, schedule, budget, quality, resources, communication, stakeholders, risks and procurements. Once compiled the plan is placed under control and forms the basis for monitoring project work.

WisDOT's Systems Planning and Operations (SPO) Scoping Engineer is responsible for establishing the project and leading project definition through, at a minimum, program level scoping. WisDOT's Project Development Section (PDS) project manager is responsible for further elaborating the project definition by engaging the project team in developing the project plan. The PDS project manager is responsible for leading the execution of the plan, verifying the results of the work and ensuring the project is closed.

The PDS project manager must prioritize work to resolve competition for time and resources and keep the team focused on completing the project work. Project work must be monitored to verify the planned work is progressing in accordance with the approved project plan. Corrective action is implemented as needed to meet the project requirements.

Requested changes to the project are managed by following the change management process. This process involves evaluating change requests for impacts across the entire project, determining the consequences of accepting or rejecting the requested change, documenting the decision and updating project documents. All change requests are documented.

Project closure is also coordinated. All necessary documentation (including lessons learned) should be completed and contracts are closed. Project closure occurs at transition points, such as design accepted and processed for bidding, or construction complete, final acceptance of product and all financial obligations closed.

Current accepted practice considers project management as a five step process which has a logical sense of flow. "The project management processes are usually presented as discrete processes with defined interfaces while, in practice, they overlap and interact in ways that cannot be completely detailed." [Project Management Institute. A Guide to the Project Management Body of Knowledge (PMBOK® Guide) - Fifth Edition. (2013). Copyright and all rights reserved. Material from this publication has been reproduced with the permission of PMI.]

The five steps are:

1. Initiating
2. Planning
3. Executing
4. Monitoring and Controlling
5. Closing

Interwoven into these five steps are a number of knowledge areas. Each knowledge area is an identified part of project management defined by its knowledge requirements and described in terms of its component processes, practices, inputs, outputs, tools, and techniques. The current knowledge areas are:

- Change Management
- Scope
- Schedule
- Budget
- Quality
- Resources

- Procurement
- Communications
- Stakeholders
- Risk

The five step process and the knowledge areas are united and coordinated by applying project integration management knowledge and skills. The interrelationship between the five steps and the knowledge areas is shown on the Five Step Process and Knowledge Area Matrix in Attachment 1.1. The matrix shows when the knowledge area processes occur. The interrelationship is discussed extensively in FDM 2-20.

1.2 Project Types

The Department is responsible for a wide variety of improvement project types, from a simple resurfacing project to an extremely complex “mega” project. The project management efforts needed to complete a particular project successfully also vary widely.

The Project Types are defined as follows:

- *Standard:* Routine improvement projects that follow normal staffing and management procedures. Individual project characteristic(s) may be unique and at times justify additional resources, management tools and reporting.
- *High Profile:* Projects that are high cost, unusually complex or have a high level of public or congressional interest. Individual project characteristics may justify additional specialized staff and management positions, as well as additional processes and reporting tools to be used
- *Mega:* Projects that meet the federal major project definition. These are typically a small number of the state's highest profile and highest risk projects. A Mega project requires a larger investment of Department staff time, resources and reporting tools to ensure effective management and control of the project.

1.3 Organizational Process Assets and Enterprise Environmental Factors

The inputs, tools/techniques, and outputs discussed as part of the knowledge areas discussions are used to different extents based on the type of project. Each of the knowledge areas are impacted by what PMI describes as “Organizational Process Assets” and “Enterprise Environmental Factors”.

“Organizational process assets are the plans, processes, policies, procedures and knowledge bases specific to and used by the performing organization. They include any artifact, practice, or knowledge from any or all of the organizations involved in the project that can be used to perform or govern the project. The process assets also include the organization's knowledge bases such as lessons learned and historical information. Organizational process assets may include completed schedules, risk data, and earned value data. Organizational process assets are inputs to most planning processes. Throughout the project, the project team members may update and add to the organizational process assets as necessary.”(1)

“Enterprise environmental factors refer to conditions, not under the control of the project team, that influence, constrain, or direct the project. Enterprise environmental factors are considered as inputs to most planning processes, may enhance or constrain project management options, and may have a positive or negative influence on the outcome.”(1)

Although WisDOT acknowledges that Organizational Process Assets and Enterprise Environmental Factors have an impact on all of the knowledge areas, they are not included in the discussions of the knowledge areas.

1.4 Project as Three Phases

In the broadest sense, the “project” that is being managed is the entire process from Project Inception to the Close of Construction. The broad “project” includes three main phases:

Phase	Effort Led by:	Overview Discussion
Project Inception to Concept Definition Report	Region SPO Scope Engineer	FDM 2-15-1.5
Concept Definition Report to Contract Award	Region PDS Project Manager in Design (Preconstruction Administration by BPD's Proposal Management Section)	FDM 2-15-1.6
Contract Award to Close of Construction	Region PDS Project Manager in Construction	FDM 2-15-1.7

Each of the phases could follow most of the process steps outlined in the knowledge area discussions. An example of this concept for Scope Management is shown in Attachment 1.2. The following sections are written by focusing on each phase as a "project", i.e., a separate project to be managed using project management.

- The activities in the "Project Inception to Concept Definition Report" phase are discussed in the Program Management Manual.
- The project management activities in the "Concept Definition Report to Contract Award" phase are primarily discussed below (See FDM 2-20). A portion of this phase (from PS&E Submittal to Contract Award) is handled by BPD's Proposal Management Section.
- The project management activities in the "Contract Award to Close of Construction" phase are discussed in the Construction and Materials Manual (See CMM 1-10).

1.5 Project Initiation Phase Overview

The process of converting a number of identified needs into an improvement program is called the Project Initiation Process. This process begins by recognizing that a need exists and a project is required to address that need. Improvement subprograms are lists of state and local highway projects that have been identified during a thorough review of system needs and sorted into various subprograms. Although there are similarities, each of the subprograms has its own unique development processes.

The many highway improvement subprograms WisDOT manages are administered by the Division of Transportation Investment Management (DTIM) and documented in their Program Management Manual (PMM). The PMM documents the policies and procedures that govern the various subprograms so that staff persons with management or operational responsibilities have a guide sufficient to accomplish their missions.

The activities as part of the project initiation process include:

- Developing preliminary information for the candidate project
- Converting the preliminary information on the candidate project into a program estimate for construction
- Approving the program level scope of the candidate project
- Preparation of the Project Management Plan
    - Initial information added by SPO Scope Engineer and scoping team
        - Location
        - Existing conditions
        - Proposal
        - Unresolved items
    - Detailed information added by PDS Project Manager and project team
        - Identify project team
        - Complete scope
        - Prepare base schedule
        - Prepare base budget
        - Update non-delivery estimates

The PDS project manager is responsible for updating the Project Management Plan. The project manager initiates the project by affirming that there are needs to be met and then committing to investigating and refining the needs to assess whether the initial project scope is reasonable. The scope (as initially proposed or as revised) is used to determine the schedule to complete the project. The resources needed to complete the project then translate into a project budget. If existing staff resources are not sufficient, the project manager will

need to procure additional resources (thus impacting the estimate). The project manager will also need to consider potential risks that may impact the project. The overall quality of the project should be addressed. The project team should evaluate the communication requirements for the project and develop a corresponding communication plan. Finally, all the information is communicated through distribution of the project management plan. After the initial project management plan is finalized, changes are addressed through a change management process.

1.6 Design Phase Overview

Design project management includes managing the delivery and performance of all the activities as noted in the Facilities Development Process (FDP). Details of the FDP are available in Facilities Development Manual (FDM), Chapter 3. The FDM provides detailed information on activities needed to follow the FDP that will ultimately result in the submitted PS&E. The final products and actions of the Design Phase are the PS&E review and approval, advertising, bid review and, finally, contract award. Details of the PS&E process are available in FDM 19-1.

At the conclusion of the previous Project Initiation Phase, the project manager and project team finalized the project management plan. This Design Phase engages the project team in developing the plan and contract identified in the project management plan. The project team is an interdisciplinary team made up of staff from departmental functional areas as well as external stakeholders as appropriate to the scope of the project. The project team is led by the project manager and works together to execute the project plan.

The project manager in the Project Development Section is accountable for ensuring all tasks required to complete the design phases are delivered on time, within budget and meet the agreed quality standards. The Technical Services and Operations Section staff is responsible for completing required project tasks related to their area of expertise.

The PDS project manager is accountable for communicating and managing project delivery progress. The project manager is in responsible charge of the project. Project team members must work together to meet project goals and objectives as defined in the project management plan.

The project management plan scope, schedule, resources (in-house or procured), budget, risks, quality, stakeholders, and communication were determined in the previous processes. The primary project management activities during the design phase process are executing the plan and monitoring and controlling the scope, schedule and budget; managing the resources, including administering procurement contracts; monitoring/controlling risks; performing quality assurance and quality control; and implementing the stakeholder and communication plan. During this phase any changes are addressed through a change management process.

The detailed Project Management activities during this phase are discussed in the following section. Each of the knowledge areas is discussed, emphasizing which project management activities occur for various processes. The activities are accomplished by considering what information is needed as inputs, what tools/techniques are available to act on the inputs, and the resulting outputs.

1.7 Construction Process Overview

Construction project management includes managing the engineering resources required to administer the project, communicating with the traveling public, property and business owners, local governments, utility facility owners, external agencies (FHWA, DNR, COE); identifying and managing risks and administering the construction contract. The Project Manager remains in responsible charge of the project throughout the construction phase. The Construction and Materials Manual (CMM) provides detailed information for managing the construction contract and communicating with project stakeholders.

The scope of work for a construction project is determined by the construction contract. Contracts vary greatly in size and complexity. Consequently, the engineering resources required to deliver the construction project will also vary. The construction delivery budget is typically based on the number of staff needed to administer the contract at any time. Staffing needs should consider concurrent activities, geographic separation, specialty work, nearby contracts, materials testing, anticipated hours of work, and duration of contract.

Initial preparation should include reviewing the bid results to identify items that, if the quantity increases, may significantly impact the cost of the project. The team should also be aware of any commitments agreed to during the design phase and potential impacts from utility, railroad, airport, or harbor contracts. The construction oversight team is responsible for collecting data and creating project records. The team must be familiar with the bid items in the contract and the associated requirements.

As with all projects and during all phases, communication is a key project management activity. During a construction project communication includes updating stakeholders on project progress, entering data in systems like the Lane Closure System and keeping the regions communications manager informed of significant

issues. The team should be especially aware of staging changes, traffic congestion and emergency vehicle access needs.

During the previous Project Initiation Phase, the Project Management Plan (Design) was initially created by the SPO Scope Engineer and then updated by the PDS Project Manager. During the subsequent Design Phase, the processes of executing, controlling, managing, monitoring, performing quality assurance/control, and using the change management process were accomplished. During this Construction Phase, the Project Management Plan (Construction) for non-Mega projects needs to be created and then executed, monitored and controlled and closed. For Mega projects, the Project Management Plan (Construction) must be developed earlier in the process. FHWA mega project requirements require a draft Project Management Plan, including both design and construction components, be completed prior to NEPA being completed (recommended 60 days prior), with the final Project Management Plan submitted within 90 days following NEPA approval. Construction components can be explained in a broad fashion in the Mega Project Management Plan, with additional detail provided later in the process. However, this additional detail must be provided prior to the authorization of construction for the project. During these processes any changes are addressed through a change management process.

The detailed Project Management activities during this phase are discussed in the Construction and Materials Manual (See CMM 1-10). Each of the knowledge areas is discussed, emphasizing which project management activities occur for various processes.

LIST OF ATTACHMENTS

Attachment 1.1	Five-Step Process and Knowledge Area Matrix
Attachment 1.2	Project as Three Phases

FDM 2-15-5 Project Management Plans on Mega Projects

December 11, 2014

5.1 Background

On August 10, 2005, the President signed into law the new surface transportation act, the “Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users” (SAFETEA-LU). The requirement for the Project Management Plan and an Annual Financial Plan are contained in section 1904(a) of SAFETEALU. This provision amends 23 U.S.C. 106(h) by indicating that a project with an estimated cost of $500 million or more, defined as a federal major project, shall submit a Project Management Plan and an annual financial plan for review. WisDOT defines a “mega project” as one that meets the federal major project definition. The Project Management Plan shall document the procedures and processes that are in effect to provide timely information to the project decision makers to effectively manage the scope, costs, schedules, and quality of, and the Federal requirements applicable to the project and the role of the agency leadership and management team in the delivery of project.

This Project Management Plan guidance is to assist the recipient of Federal financial assistance in the preparation of a Project Management Plan to meet the requirements of SAFETEA-LU. The intent of this guidance is to provide a general framework in which modifications can be made in order to produce a Project Management Plan that will most effectively serve the State Transportation Agency (STA), the FHWA, and other sponsoring agencies throughout the project continuum.

5.2 Initial Project Management Plan - General

WisDOT mega projects are monitored from planning to operations. The Project Management Plan will help the management team maintain a constant focus towards delivering the major project in accordance with the customers’ needs, wants, and expectations. Mega projects must be delivered in a manner that captures the public’s trust and confidence in the State and Federal transportation agencies’ ability to effectively and efficiently deliver a quality product.

For most projects the recipient of Federal financial assistance will be a State Transportation Agency (STA). Therefore, the STA will prepare the Project Management Plan. A draft of the Project Management Plan must be submitted to the FHWA for review prior to approval of the NEPA decision document. The FHWA will provide comments and the STA must submit a Project Management Plan for approval within 90 days of the date of the signed NEPA decision document (e.g. EA/ FONSI, Record of Decision).

For the first Project Management Plan, the FHWA Major Projects Team must provide concurrence prior to the FHWA Division Office approval. After that, either the Division or Headquarters Offices may request FHWA Headquarters review and concurrence prior to the Division’s approval of subsequent Project Management Plan revisions. The Project Management Plan is to be a living document in which revisions will be issued as the project progresses in order to add, modify, or delete provisions that will result in the most effectively managed project. At a minimum, the Project Management Plan should be revised and approved prior to the authorization

of federal-aid funds for right of way acquisition and prior to authorization of federal-aid funds for construction.

5.3 Purpose

The Project Management Plan is the guide for implementing the mega projects and documents assumptions and decisions regarding communication, management processes, execution and overall project control. The ultimate purpose of the Project Management Plan is to clearly define the roles, responsibilities, procedures and processes that will result in the major project being managed such that it is completed:

- On-time
- Within budget
- With the highest degree of quality
- In a safe manner for both the individuals working on the project and for the traveling public, and
- In a manner in which the public trust, support, and confidence in the project will be maintained.

The Project Management Plan addresses all phases of the mega project life cycle, and ensures that the project will be managed holistically and as a continuum, not incrementally as the project progresses. It is essential that the Project Management Plan establish the metrics by which the success of the project is defined. It is expected that all sponsoring agencies will endorse the Project Management Plan.

5.3.1 Topics

The following topics from the basic contents for Project Management Plan. The intent of the following sections is to provide a general framework in which modifications can be made in order to produce a Project Management Plan that will most effectively serve the STA, the FHWA, and other sponsoring agencies throughout the project continuum. References to existing STA documented processes may be used in the Project Management Plan.

1. Project Descriptions and Scope of Work
2. Goals and Objectives
3. Project Organizational Chart, Roles, and Responsibilities
4. Project Phases
5. Procurement and Contract Management
6. Cost Budget and Schedule
7. Project Reporting and Tracking
    a. Executive Summary
    - Project Activities and Deliverables
    - Action Items/Outstanding Issues
    - Project Schedule
    - Project Cost
    - Project Quality
    - Other Status Reports
    - Internal and Stakeholder Communications
8. Project Management Controls (Scope, Cost, Schedule, Claims, etc.)
9. Risk Management Plan
    - Scope Management Plan
    - Scheduling Software
    - Cost Tracking Software
    - Project Matrices
    - New and Innovative Contracting Strategies
    - Value Engineering, Value Analysis, and Constructability Reviews
    - Contractor Outreach Meetings
    - Partnering
    - Change Order and Extra Work Order Procedures
    - Claims Management Procedure
    - Other Programs

10. Design Quality Assurance / Quality Control (QA/QC)
11. Construction Quality Assurance / Quality Control (QA/QC)
12. Environmental Monitoring
13. Right of Way
14. Safety and Security
15. Traffic Management
16. Project Communications (Media and Public Information)
17. Civil Rights Program
18. Closeout Plan
19. Project Documentation
20. Other Possible Sections
21. Appendices
22. Executive Leadership Endorsement

Other items may be added depending on the project's characteristics.

5.3.2 WisDOT Information

Mega projects are also discussed in the Program Management Manual (Sec 03-30-05 – Southeast Wisconsin Freeway Megaprojects).

Also, on-line information on mega projects is available on:

https://wisconsindot.gov/Pages/doing-bus/eng-consultants/cnslt-rsrces/rdwy/mega.aspx

Of special interest on the Internet site are:

- Item 8 Roles and Responsibilities Guidelines
- Item 9 Management Systems
- Item 10 Budget Estimation and Management
- Item 13 Best Practices
- Item 16 Mega Project Estimating

Of special interest on the Internet site is the document Change Management for Mega Projects (Item 11):

https://wisconsindot.gov/rdwy/mega/changemgmt.pdf

That document describes the change management process and states that "… Mega, Major, and High Profile projects shall utilize the change management process."

The process includes reviewing potential changes for the several phases of a project:

- Project concept through environmental document completion
- Environmental document completion through project letting, and
- Post project letting through final project close-out

Each phase includes formation of a Change Management Team, the department level of authority based on the cost of the proposed change or the percentage of project reserves being considered for use, and a regular schedule of meetings to evaluate changes.

Another source of information is FHWA's Risk Management Tool for Managing the Planning / Environmental Phases of Prospective Major Projects:

http://www.fhwa.dot.gov/ipd/project_delivery/resources/risk_management/risk_management_tools.htm

FHWA's Risk Management Tool mentioned above gives a good series of questions to ask when considering what risks might be present on a project. Although the Tool was written for the planning/environmental phases of a project, several of the questions could be used generically for most phases of a project:

- What is the need the project will address?
- What are the risks that could significantly affect the scope of the project?
- What are the risks that could significantly affect the schedule of the project?

- What are the risks that could significantly affect the budget of the project?
- What are the risks that could significantly affect the communication on the project?
- What are the risks that could significantly affect the resources needed for the project?
- What are the risks that could significantly affect procuring consultant staff for the project?
- What are the risks of not having good inter-agency cooperation on the project?
- What lessons learned from recent similar projects should be factored into this project?

FDM 2-15-10 Project Financial Plans

December 11, 2014

10.1 Background

On August 10, 2005, the President signed into law the new surface transportation act, the “Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users” (SAFETEA-LU). The requirement for an Annual Financial Plan is contained in section 1904(a) of SAFETEA-LU. This procedure describes when a Financial Plan is required based on the total project cost.

10.2 Process for $100 to $500 Million Projects

Section 1904(a)(2) of the Safe, Accountable, Flexible, Efficient Transportation Act: A legacy for Users (SAFETEA-LU) added a new section, 23 USC 106(i), which requires recipients for federal financial assistance for projects with a total cost of between $100 million and up to $500 million in year-of-expenditure dollars, to prepare an annual financial plan. Unlike financial plans for projects which cost in excess of $500 million, FHWA does not formally approve the plan that is prepared. However, it must be available for their review. For determining whether the project costs exceed $100 million, the Department will look at the total cost estimate for the project limits set forth in the Record-of-Decision or the final environmental determination.

10.2.1 Initial Financial Plan

For projects in the $100 to $500 million dollar range, the initial financial plan may be developed and completed at the earliest feasible point in the project development process but it needs to be finalized before requesting FHWA authorization to obligate federal funds for the first significant construction contract for the project. Therefore, the financial plan will be submitted to FHWA by the due date for submitting the form FHWA-37 to the Bureau of Financial Services (BFS) according to the letting schedule shown in FDM 19-1 Attachment 1.2.

In order to ensure timely completion of the financial plan, the following steps should be completed:

- Six months prior to the letting date for the first significant construction project, staff from the Office of Policy Budget and Finance (OPBF) and the Bureau of State Highway Programs (BSHP) will contact the project Manager regarding the need to complete the financial plan.
- Staff from OBPF and BSHP will compile a draft of the financial plan schedules required: Cost Estimate, Implementation Plan, Financing and Revenues, and Cash Flow and meet with the project manager to ensure the anticipated project schedule has been accurately reflected in FIIPS.
- The project manager will submit to BSHP and OPBF an identification of potential risks and mitigating factors to the project that will be included as part of the financial plan.
- The director of the OPBF and the administrator of DTIM will sign the letter of certification included with the plan on behalf of the Department. OPBF staff will then submit the plan to the FHWA Wisconsin division office. OPBF will retain a signed copy of the financial plan.

10.2.2 Annual Update to the Financial Plan

In order to ensure timely completion of the annual update to the financial plan, the following steps should be completed:

- The required annual update will be completed by September 30 of each year with financial information as of June 30th.
- Staff from OBPF and BSHP will compile a draft of the financial schedules needed to update the financial plan and meet with the project manager to ensure the anticipated project schedule has been accurately reflected in FIIPS.
- The project manager will submit to BSHP and OPBF an updated list of potential risks to the project that will be included in the annual update. The project manager will be responsible for explaining the reasons for significant changes to the either the cost or schedule of the project when compared to the previous financial plan for the project.
- The director of the OPBF and the administrator of DTIM will sign the letter of certification included with the plan on behalf of the Department. OPBF staff will then submit a copy of the plan to the FHWA

Wisconsin division office.

10.3 Process for Projects in Excess of $500 Million

Section 1904(a)(2) of the Safe, Accountable, Flexible, Efficient Transportation Act: A Legacy for Users (SAFETEA-LU) amended 23USC106(h) to require financial plans for projects expected to cost $500 million or more in year of expenditure dollars. FHWA must formally approve the plan before federal funds maybe authorized for construction.

For determining whether the project costs exceed $500 million, the Department will use the total cost estimate for the project limits set forth in the Record-of-Decision or the final environmental determination.

10.3.1 Initial Financial Plan

For projects estimated to cost in excess of $500 million, the initial financial plan may be developed and completed at the earliest feasible point in the project development process but it needs to be finalized before requesting FHWA authorization to obligate federal funds for the first significant construction contract for the project. Therefore, the financial plan must be approved by FHWA no later than the date FHWA authorizes advertising for bids for the first significant construction project. For additional information, refer to FDM 19-1 Attachment 1.2.

In order to ensure timely completion of the financial plan, the following steps should be completed:

- 12 months prior to the letting date for the first significant construction project, project team staff shall contact the Office of Policy Budget and Finance (OPBF) and the Bureau of State Highway Programs (BSHP) staff regarding the need to complete the financial plan. FHWA Wisconsin Division staff will also be invited to participate in the development of the initial financial plan.
- Staff from OBPF, BSHP and the project team will meet to assign responsibility for preparing necessary schedules and other information to be included in the plan to be submitted to FHWA as identified in Table 10.1.
- OPBF staff will coordinate the development of the financial plan document and working with the project team schedule the review of the plan by the Oversight committee. OPBF staff will then submit the plan to the FHWA Wisconsin division office. OPBF will retain a signed copy of the plan submitted to FHWA.

10.3.2 Annual Update to the Financial Plan

In order to ensure timely completion of the annual update to the financial plan, the following steps should be completed:

- The required annual update will be completed by September 30 of each year with financial information as of June 30th.
- Staff from OPBF, BSHP, and the Project team will meet, as needed, during the year to review and discuss significant changes to the project cost and estimate.

Table 10.1 Information Needed for Financial Plan

Financial Plan Component	Responsible Organizational Unit
Executive Summary	OBPF
Project Progress Summary	Project Team
Current Cost Estimate	Project Team
Cost Estimate by Cost Element	Project Team
Basis of Estimate	Project Team
Implementation Plan	Project Team
Contract Schedule	Project Team
Project Financing and Revenues	OBPF/BSHP
Overall Financial Plan	OBPF/BSHP
Federal Funds	OBPF/BSHP
State Funds	OBPF/BSHP
Revenue Assumptions, Risks, and Mitigation	OBPF/BSHP
Project Cash Flow	OBPF/BSHP/Project Team
Other Factors	OBPF/Project Team
Wisconsin Budget	OBPF
Cost and Schedule Containment Strategies	Project Team
Schedule for Annual Update	OBPF
Additional Factors	Project Team
Cost and Revenue History	OPBF - Revenues Project Team - Cost
Cost and Revenue Trends	OPBF/Project Team
Cost Trends over Past Year	Project Team
Revenue Trends over Past Year	OBPF
Revenue Shortfall Mitigation	OBPF
Summary of Significant Cost Reductions	Project Team
Summary of Significant Cost Increases	Project Team

FDM 2-15-15 References

December 11, 2014

1. Project Management Institute. *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)* - Fifth Edition. (2013). Copyright and all rights reserved. Material from this publication has been reproduced with the permission of PMI.