Initiate & Align Worksheet

*<Insert State Route, Project Name>*

*MP to MP*

*Project Manager: <Insert name here>*

*<Date>*

Initiate and Align the team, focus on a common goal. This worksheet is the first element of a Project Management Plan. The project manager can customize this form to meet the needs of the team and the project. It serves as a day-to-day tool to help manage the project and measure progress. The worksheet captures project parameters such as description, boundaries, funding, milestones, performance, and responsibilities of the manager and team (*text in italics is instructional and should be deleted when the worksheet is filled out*). Project manager and team should also review the Guidance Documents Information on WSDOT’s Practical Design Procedures posted a*t:* <http://www.wsdot.wa.gov/publications/fulltext/design/ASDE/Practical_Design.pdf>

|  |  |  |
| --- | --- | --- |
| ***Design Coordination*** | | |
| ***Project Team (core)*** | ***Consent Based Recommendations***  *Interdisciplinary and Community Engagement* | |
| begins with the PROJECT TEAM or a portion of the project team such as…  Project Engineer / Assistant Project Engineer  Team Leader / Designers  CADD Operator | continues with the WSDOT specialty groups…  Value Engineering/Risk Assessment  Utilities/Real Estate Services/Access  Landscape / R/W Plans & Research  Development Services / Local Programs  Construction / Geotechnical /Materials  Program Management / Planning  Environmental – Biology / Hydraulics  Permits / Water Quality / Acoustics / Air Quality  Traffic - Traffic Analysis / Traffic Operations  Construction Traffic Coordination / Traffic Safety  Electrical & Signal Design / Sign Design / ITS | continues with the external parties…  Other agencies, such as…  Army Corps of Engineers  Washington State Patrol  Department of Fish & Game  Department of Natural Resources  Tribes  Local County and/or City Agency  the public  Neighborhood Groups  Stakeholders  Railroads |
| Electrical Services / Maintenance  Plan Review /Area Administrator / Design Review  FHWA / Area Engineering Manager / Survey  HQ: Bridge, Materials, Hazardous Waste, Design, Architect |

### Project Description:

The project description is to be consistent with the Project Profile.

### Boundaries

Validate project parameters established in the Project Profile and CPMS. Identify project specific boundaries, as needed, which may include:

* Project limits (MP to MP)
* Funding limits
* Authority levels
* Legal and Regulatory (for example; Environmental regulations requiring fish windows)

### Team Identification

Identify project team functional areas- including specialty groups, consultants, contractors, and other organizations or agencies involved in the project.

*Who should be involved in WSDOT? (Check all that apply and add as needed for your project)*

|  |  |  |  |
| --- | --- | --- | --- |
|  | Access and Hearings |  | Planning |
|  | Active Transportation Coordinators |  | Maintenance |
|  | Architecture |  | Materials |
|  | Bridge & Structures |  | Program Management |
|  | Construction |  | Public Information Office |
|  | Consultant Liaison |  | Rail, Freight, and Ports |
|  | Design & Plans Review |  | Real Estate Services |
|  | Development Services |  | Right-of-Way |
|  | Environmental |  | Roadside Development |
|  | Geographical Services |  | Traffic |
|  | Geotechnical Services |  | Traffic Field Assessment |
|  | Highways & Local Programs |  | Transportation Data Office |
|  | Hydraulics |  | Utilities |
|  | Land Survey |  | HQ Railroad Liaison |
|  |  |  | Other |
|  |  |  |  |

*Consider External Team Members*

|  |  |
| --- | --- |
|  | Local Agencies |
|  | City |
|  | County |
|  | Tribal |
|  | Metropolitan Planning Organization – MPO |
|  | Regional Transportation Planning Organization – RTPO |
|  | Emergency Services |
|  | FHWA, FTA, FAA |
|  | *<fill in other members here>* |
|  | *<fill in other members here>* |
|  | *<fill in other members here>* |
|  | *<fill in other members here>* |

### Team Mission

*Describe the purpose for the project.*

### Milestones

Identify and track major milestones, some milestones do not apply to all projects

|  |  |  |
| --- | --- | --- |
| CPMS Milestone | | Date: |
|  | Project Definition Complete |  |
|  | Begin Preliminary Engineering |  |
|  | Right of Way Plans Approved |  |
|  | Environmental Documentation Complete |  |
|  | Right of Way Plans Phase Start |  |
|  | Right of Way Certification |  |
|  | Environmental Permits Complete |  |
|  | Advertisement (Ad) date |  |
|  | Award |  |
|  | PE Phase End |  |
|  | Construction work start |  |
|  | Operationally Complete |  |
|  | Construction phase end |  |

The project manager has the discretion to add milestones. <http://wwwi.wsdot.wa.gov/Planning/CPDMO/>

### Roles & Responsibilities:

Describe, “who will do what” by individual or by team. Be specific - plan sheets, analysis, reports, inspection, testing, etc. The Internal Scope of Work Agreement can help.

**Design Manual Chapter 1100**:<http://www.wsdot.wa.gov/publications/manuals/fulltext/M22-01/1100.pdf>

### Measures of Success

Identify the goals, deliverables or outcomes and the corresponding measures of success. These are the metrics that measure progress and performance.

### Operating Guidelines

Develop and agree on the operating guidelines on how the team will govern itself.

* *Team decision-making process*
* *Team meetings (frequency, who should attend, etc.)*
* *Communication (methods, frequency, chain of command, etc.)*
* *Manage team change*
* *Manage team conflict*

### Recognition

Identify how team will be recognized for achieving performance targets.