



Milestone Management: For Organizations with Loads to Do

Rachel Stone

Utah Governor's Office of Management and Budget

Does this sound like you?

Are you in demand?

Are your caseloads overflowing?

Are competing projects falling through the cracks?

It is hard to tell what your priorities should be?

Is it hard to define and quantify systematic obstacles?

Milestone Management



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Types of Government Work



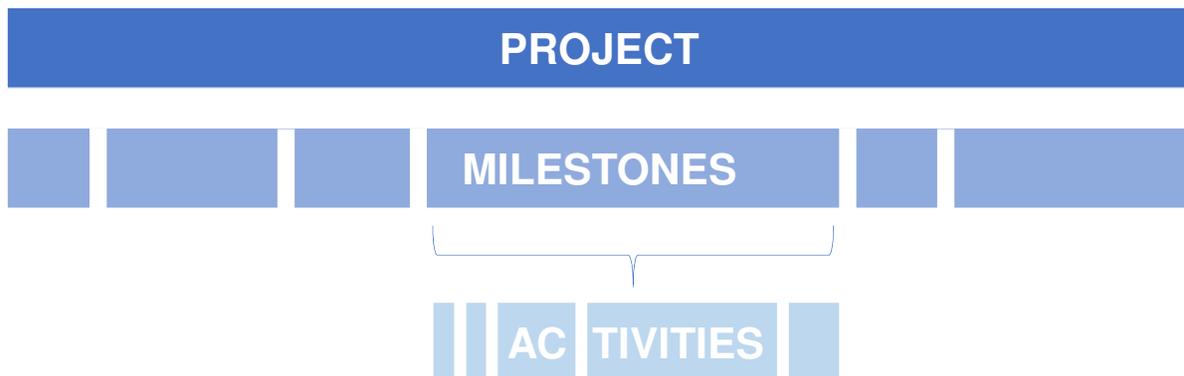
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Types of Government Work



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Milestone Management



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With competing projects...

- Which one should I work on right now?
- What should I work on next?
- Which projects are progressing? Which are not?
- Why are some projects not progressing?
- Is something hindering multiple projects from progressing?
- Do I have too many projects?
- As a supervisor, which projects need my support most?
- How does progress compare across project managers?

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Milestone Management

- Project
 - Milestone
 - Activity
 - Target Start Date / Actual Start Date
 - Target End Date / Actual End Date
 - Status
 - Not started
 - In Progress
 - Stuck, because...
 - Complete

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The social services blueprint solution for milestone management was developed with Utah state agencies



utah department of **human services**



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Demand & Revenue



Each year, social services agencies serve hundreds of thousands of vulnerable Utahns.



These agencies are among the largest in state government, expending significant portions of the state budget.

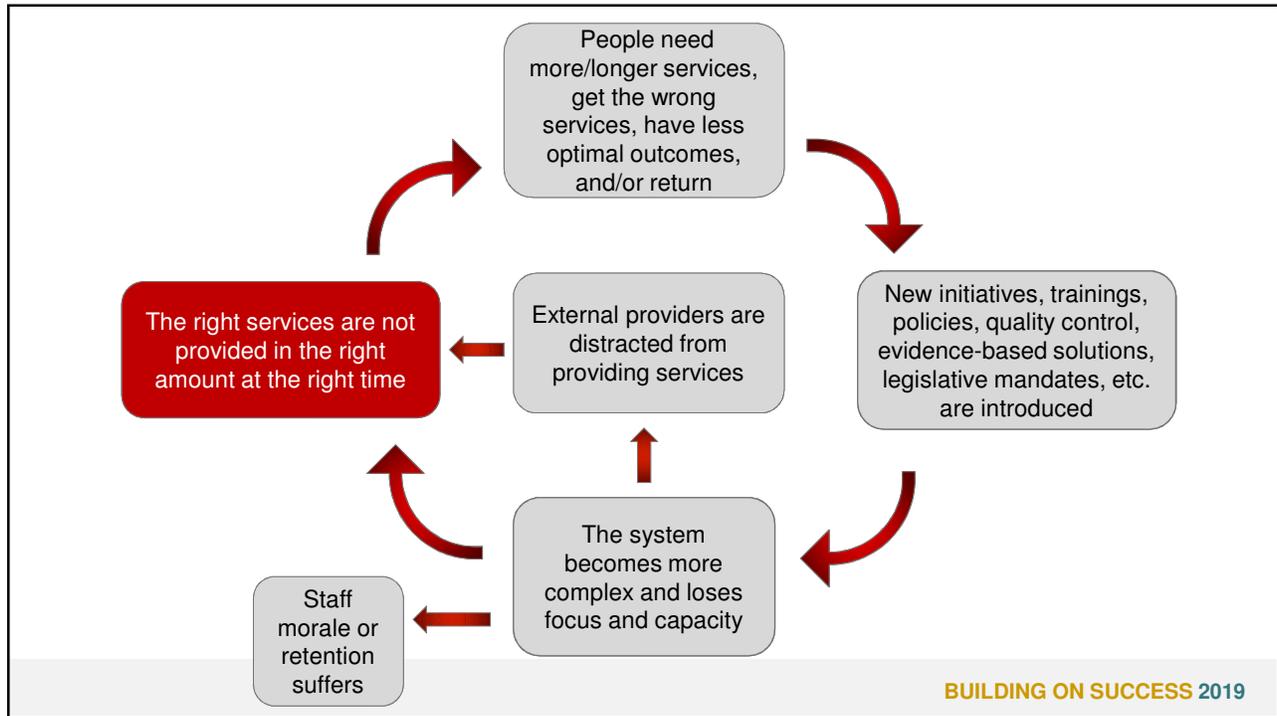
34%

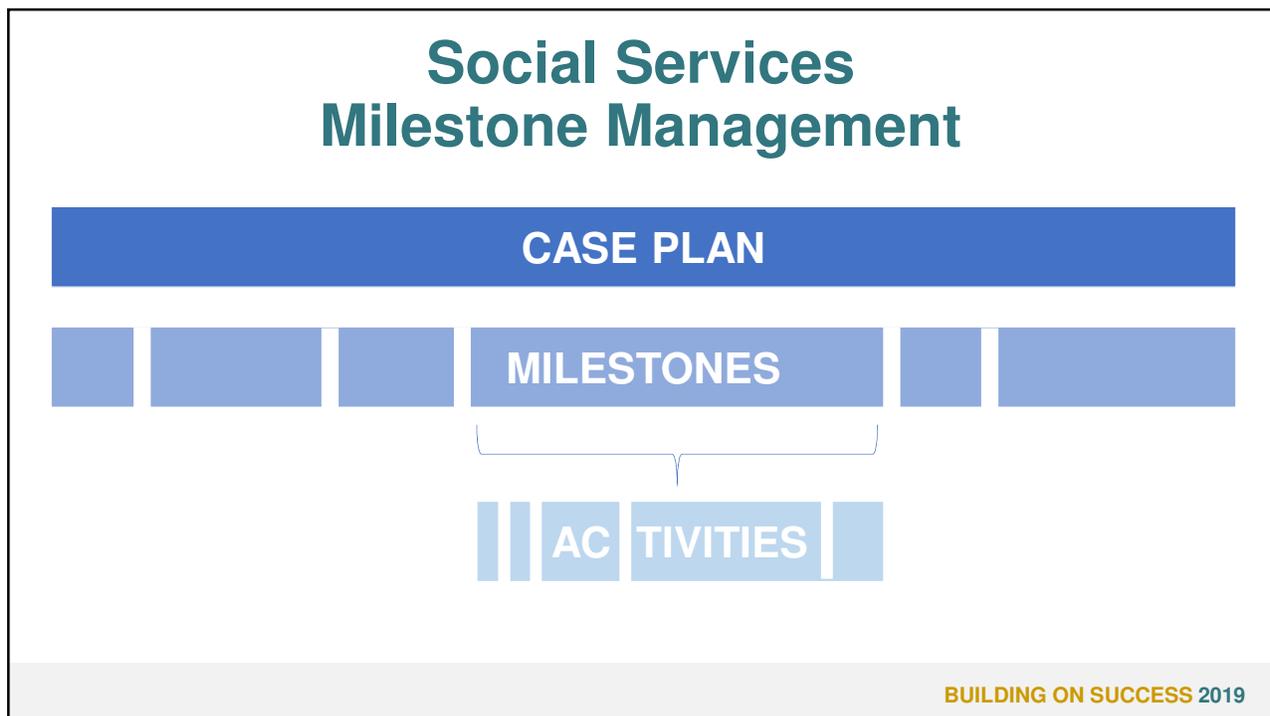
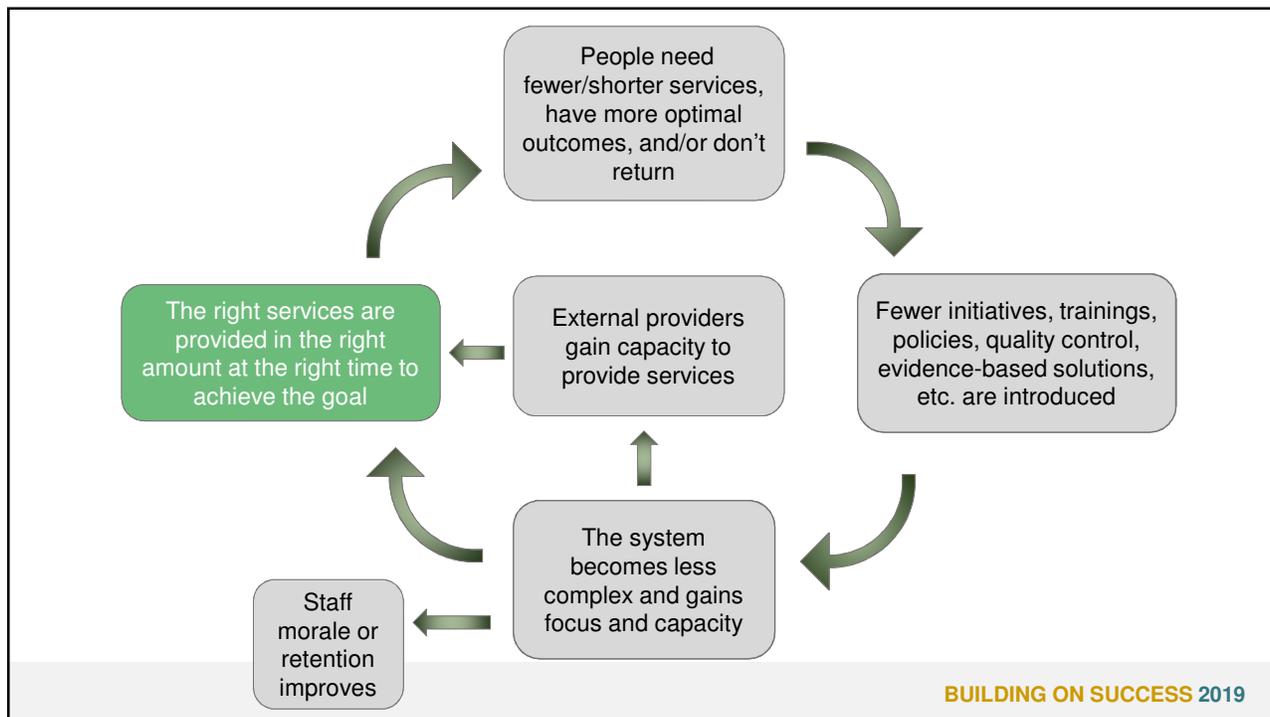
Social services programs comprise the largest share of all budget expenditures across **all fund types** in Utah at 34%, which equals about \$6.3 billion.



There is a growing gap between demand and available revenue for these services.

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Milestone Management Synchronization



Family Employment Program

Vocational Rehabilitation

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Milestone Management: Process Changes for Success

Dennis Franklin
Utah Department of Corrections

The Why

Recidivism is reduced and public safety increased by addressing:

- Right behavior driver
- With the right intervention
- At the right time

The Case Action Plan (CAP) is a crucial for prioritizing services to offenders



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Case Action Plan (CAP)

1. CAPs are based upon the risk and needs of the individual as identified by a risk assessment tool
2. Targets interventions based on the individual's risk and needs
3. Accounts for individual's strengths, barriers, and responsivity factors
4. Follows a team-based approach → includes the individual's input and a collaborative approach with treatment and service providers, as well as criminal justice professionals
5. Is flexible, ongoing, and dynamic (excluding court orders)
6. Identifies short- and long-term benefits for achieving goals

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Case Action Plan [+] Expand Header

Created by dblanch2 | Created date 10/02/2014 | Cap Not Required Code ... Update by gjensen2 10/23/2018

LS/RNR - 04/30/2019 Special Conditions Goals/Action Steps Other Plan Components

Active All Open All Close All Refresh

ACCOMMODATION/HOUSING SAFETY

GOAL Change or improve living situation to reduce or eliminate association with those involved in criminal behavior or other risky influences and provide a more enjoyable living environment.

Add Action Step

EDUCATION

GOAL Obtain a GED or high school diploma or other appropriate training to enhance employment or job seeking opportunities.

Add Action Step

SUBSTANCE ABUSE

EMOTIONAL/PERSONAL

CRIMINAL HISTORY

GOAL Refrain from future criminal behavior,

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Current CAP Challenges

- Goals in database were not consistent with the domains from our risk assessment creating some confusion
- Only two levels in the CAP, goals and action steps
- Action steps combined activities and events
- Target start date was missing
- Lacking a CAP progress indicator
- No caseload CAP snapshot

Current CAP Challenges Cont.

- Gathering CAP information required exploring each individual goal and action step
- Successful completion and progress of activities were not tracked
- No clear path to identify stalled activities and the accompanying reason
- Lacking ability for supervisors to identify needs of case managers or lack of resources

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Current CAP Challenges Cont.

- Inmates are assigned to a case manager based off body location, no consistency
- Case managers required to perform duties not directly related to case management
- Security core staffing by case managers
- Misunderstanding of CAP purpose and what should be in a CAP

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Technology and Business Changes

- Technology is a tool, not the solution
- Database improvements are integral to this project
- Success will be minimal without staff championing new process changes
- Lasting impact require business process changes
- Understanding the “why” is crucial



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Business Process Changes



- Consistent caseloads for case managers
- Eliminating core staffing for case managers
- Training staff to focus CAPs on the driver of criminal behavior not just programs
- Including individual barriers as part of the CAP
- Using stuck reasons to address roadblocks
- Rewording database to match risk areas, separating milestones and activities

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Technology Changes

- Tables in the database
- Replaced action steps with milestones and activities
- Included target start dates and specified target end dates
- Created a CAP tracker function
- Added Offender CAP Overview screen
- Stalled status – with reason

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CAP Tracker Listing

Milestone List

Keyword Search:

	Offender Number	Offender Name	Body Location	Milestone Name	Status or Progress Color	Risk/Needs Area
<input checked="" type="radio"/>	123	Abc, def	CEDAR CITY JAIL	TABE Testing	Not Started	EDUCATION
<input type="radio"/>	456	ljk, mnp	OGDEN CCC	Community support group	In Progress	SUBSTANCE ABUSE
<input type="radio"/>	789	Wxy, tgb	KANE CO JAIL	Custom Criminal History	In Progress	CRIMINAL HISTORY
<input type="radio"/>	456	ljk, mnp	OGDEN CCC	Thinking for a change	In Progress	CRIMINAL HISTORY
<input type="radio"/>	222	Hjt, mnr	WASATCH CO JAIL	List job ideas	Not Started	EMPLOYMENT
<input type="radio"/>	444	OkI, bwe	OTHER CCC	List Negative Attitudes	Complete	EMPLOYMENT

Showing 1 to 6 of 6 entries

Activity List

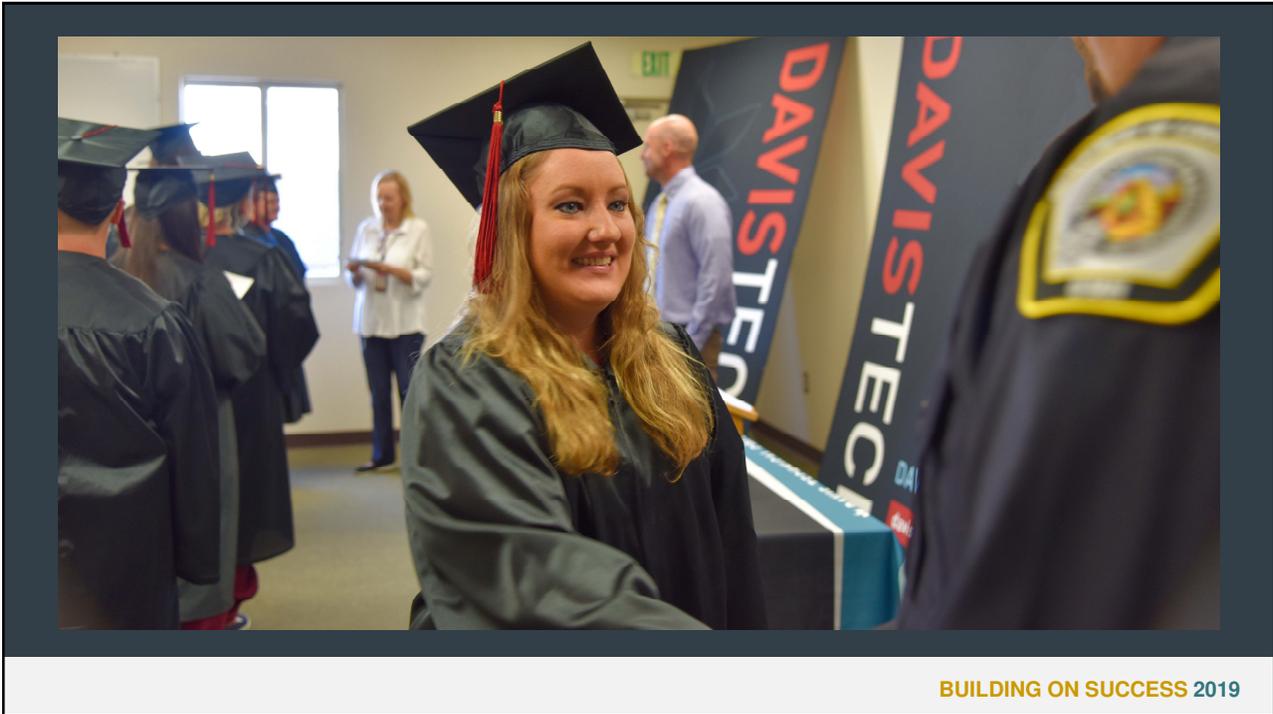
Keyword Search:

	Activity Name	Status or Progress Color	Reason Code	Notes	Target Start / Actual Start	Target End / Actual End
<input type="checkbox"/>	Test Activity 1	In Progress	Test Reason 1	Activity Comments 1	10/02/2019 / 10/13/2019	10/30/2019
<input type="checkbox"/>	Test Activity 2	Not Started	Test Reason 2	Activity Comments 2	10/21/2019 / 10/22/2019	
<input type="checkbox"/>	Test Activity 3	Complete	Test Reason 3	Activity Comments 3	11/15/2019 / 12/01/2019	12/31/2019 / 12/15/2019

Showing 1 to 3 of 3 entries

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AiM Milestone Management

Jerry Sheets
Utah Division of Facilities Construction and Management

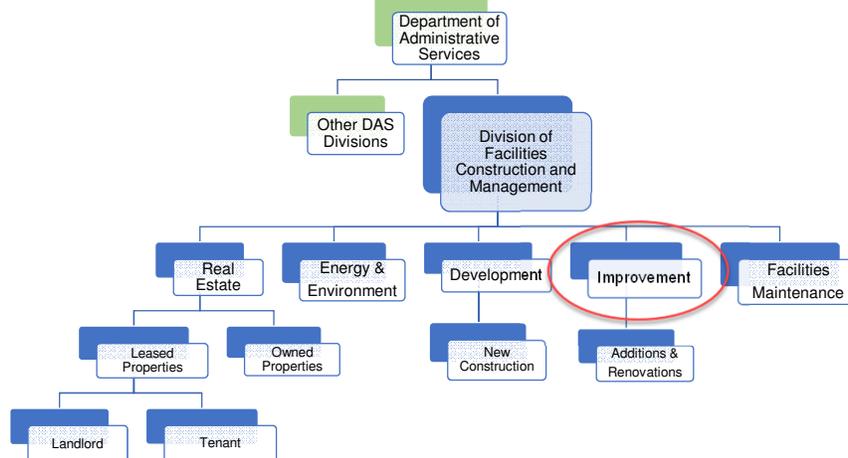


Agenda

- Background
- The Problem
- The Solution
- Q & A

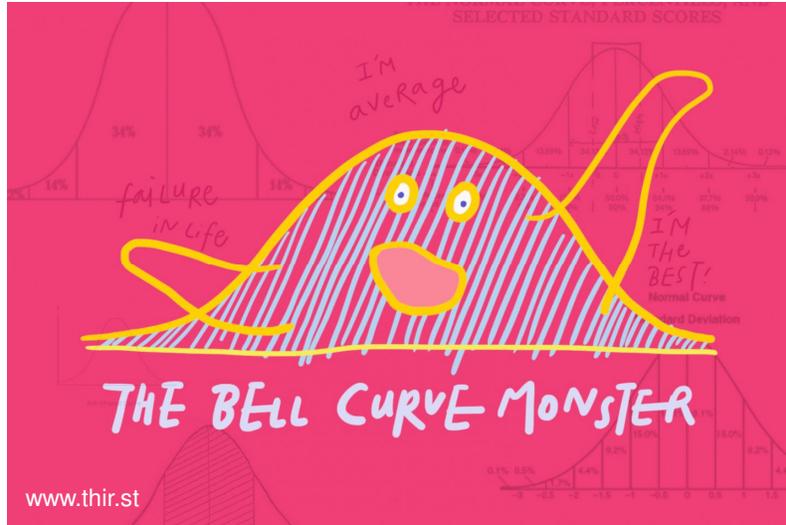
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DFCM



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The Bell Curve Monster



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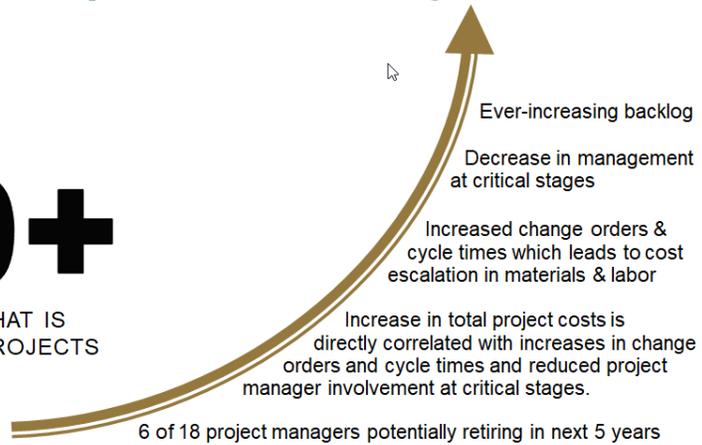
Vicious Cycle

Capital Improvement Projects



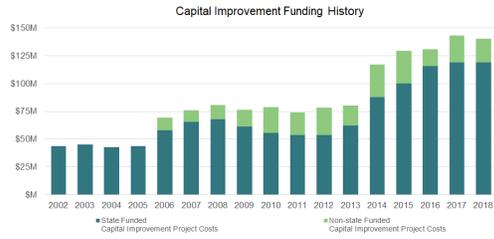
200+

PROJECT BACKLOG THAT IS GROWING BY OVER 30 PROJECTS PER YEAR

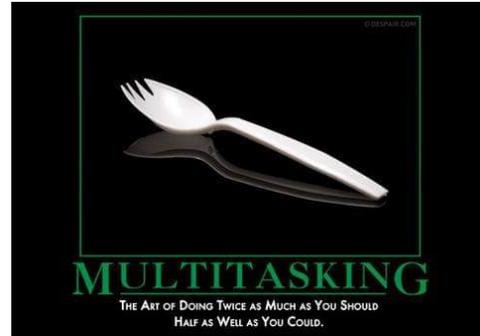
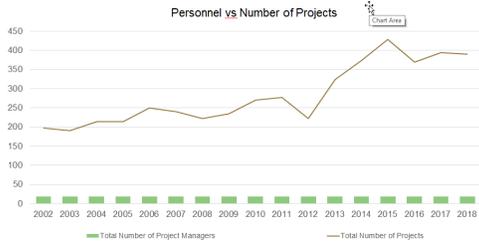


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Capital Improvement Projects

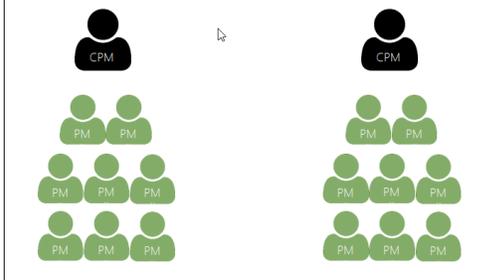


Capital Improvement Projects

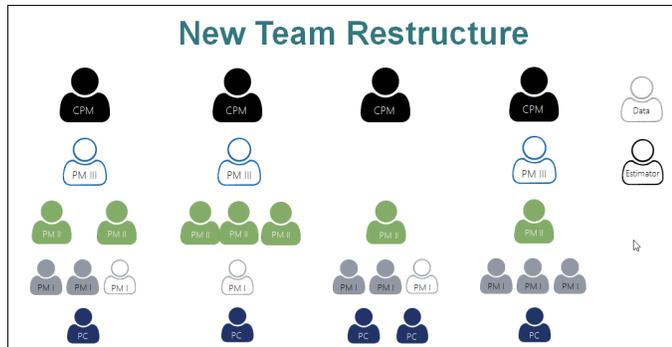


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Old Team Structure



New Team Restructure



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Full Kit Checklist

Estimation	Programming	Schematic Design	Detailed Design
<ul style="list-style-type: none"> Stakeholder identification Scoping Risk register Delivery method Communications plan Estimate Schedule RFP for programming Bid & award programming FF&E/Equipment IT/AV/Security 	<ul style="list-style-type: none"> Project management plan Full scope document DFCM programmatic standards checklist Risk register update Communications plan update Estimate update Schedule update (Gantt) Energy modeling Owner's Performance Requirements SECs Commissioning agent (CX) RFP for Design (where appropriate) Bid & award design (where appropriate) RFP for CM/GC (where appropriate) Bid & award CM/GC (where appropriate) FF&E/Equipment IT/AV/Security Sign-off (Architect, Agency, DFCM) Management approval Lead and asbestos survey 	<ul style="list-style-type: none"> DFCM SD checklist Communications plan Risk register update Estimate update Programmatic review Schedule update (CPM) Sign-off (Architect, agency, DFCM, CM/GC) Management approval FF&E/Equipment IT/AV/Security 	<ul style="list-style-type: none"> DFCM DD checklist Communications plan Risk register update Estimate update Programmatic review Schedule update (CPM) Sign-off (Architect, agency, DFCM, CM/GC) Management approval FF&E/Equipment IT/AV/Security
Construction Docs	Pre-construction	Construction	Closeout
<ul style="list-style-type: none"> DFCM CD checklist Communications plan Risk register update EDMS plan & approval Permits Inspections RFP for construction Bid & award construction Estimate update Programmatic review Schedule update (CPM) FF&E/Equipment IT/AV/Security Sign-off (Architect, agency, DFCM, CM/GC) Management approval 	<ul style="list-style-type: none"> Construction stakeholder identification Communications plan QA/QC plan Safety plan Closeout plan Contractor training Pre-con meeting 	<ul style="list-style-type: none"> All RFIs answered All PCOs processed All submittals approved All deferred submittals approved Establish OAC FF&E/Equipment IT/AV/Security Moving 	<ul style="list-style-type: none"> Certificate of Significant Completion Certificate of Occupancy Punchlist Redlines / As-built drawings Warranties O&M User training Commissioning sign-off Ratings (AE, contractors, CX) Reconcile contracts Approve final payments Upload documents to Projectwise

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Enhancing AiM/CPPM with TOC

Theory of Constraints

Presented By: Jerry Sheets



Utah!



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QUEUE
Created by SYSTEM On 06/01/2018 09:55 AM
Last Edited by CLINT BUNNELL On 11/20/2018 01:47 PM

QUEUE - CHECKLIST ITEMS

Capital Project: 19235790
GUNTHER TRADES BLDG AND CAMPUS

Component Group: QUEUE
QUEUE - PROJECT WAITING FOR FULL

Organization:

Employee:

Baseline Start:

Estimated Start: Nov 19, 2018

Actual Start:

Baseline End:

Estimated End: Nov 19, 2018

Actual End:

Percent Complete: 100.00

Status: ACTIVE

Type: SOFT COSTS

Component Sequence: 10

Planned Budget: \$0.00

Original Budget: \$0.00

Budget Revisions: \$0.00

Total Budget: \$0.00

Committed: \$0.00

Expensed: \$0.00

Anticipated: \$0.00

Remaining: \$0.00

Checklist Remove Add

Item	Description	Responsibility	Expected	Completed	Completed By
<input type="checkbox"/> 03	INITIATE STAKEHOLDER REGISTER	PM CAP IMPROVEMENT	Nov 19, 2018		
<input type="checkbox"/> 05	INITIATE RISK REGISTER	PM CAP IMPROVEMENT	Nov 19, 2018		
<input type="checkbox"/> 06	INITIATE COMMUNICATIONS PLAN	PM CAP IMPROVEMENT	Nov 19, 2018		

Status History

Related Documents

Checklist

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Manager's WorkDesk

AiM WorkDesk

Add

Menu

- Accounts Payable
- Capital Projects
- Contract Administration
- Finance
- Lease
- Property
- Purchasing
- Time and Attendance
- System Administration

Administrator Messages

4/28/18 4:00 PM -- GJENSEN -- AIM PROD VERSION 9.2.6 - Oracle Exadata 12c - UPDATED FROM AIM PROD 8.3 on Oracle 12c on April 30, 2018

Quick Search

Q Capital Project

Q Consultant Contract

Q Amendment

Q Construction Contract

Q Construction Change Order

Q Payment Application

My Projects

- 15 Capital Projects -- Capital Project -- MMUELLER - ALL PROJECTS
- 1 Capital Projects -- Capital Project -- CAPITAL PROJECT STATUS = QUEUE
- 3 Capital Projects -- Capital Project -- CAPITAL PROJECT STATUS = ACTIVE
- 0 Capital Projects -- Capital Project -- CAPITAL PROJECT STATUS = MASTER PLANNING
- 1 Capital Projects -- Capital Project -- CAPITAL PROJECT STATUS = PROGRAMMING
- 0 Capital Projects -- Capital Project -- CAPITAL PROJECT STATUS = SELECTION
- 5 Capital Projects -- Capital Project -- CAPITAL PROJECT STATUS = DESIGN

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19

Project Cleared for Activity

DESIGN IMPROVEMENT

Created By SYSTEM On 06/01/2018 09:55 AM
 Last Edited by CLINT BUNNELL On 11/20/2018 01:47 PM

Status: ACTIVE

DESIGN IMPROVEMENT - CHECKLIST ITEMS

Capital Project: 19235790
GUNTHER TRADES BLDG AND CAMPUS

Component Group: DESIGN - IMPROV
DESIGN IMPROVEMENT TYPICAL

Organization:

Employee:

Baseline Start:

Estimated Start:

Actual Start:

Baseline End:

Estimated End:

Actual End:

Percent Complete:

Type: SOFT COSTS

Component Sequence: 20

Planned Budget: \$0.00

Original Budget: \$0.00

Budget Revisions: \$0.00

Total Budget: \$0.00

Committed: \$0.00

Expensed: \$0.00

Anticipated: \$0.00

Remaining: \$0.00

Item	Description	Responsibility	Expected	Completed	Completed By
01	CBE AND FUNDING COMMITMENTS UPDATE	PM CAP DEVELOPMENT	<input type="text"/>		
02	SCOPE REVIEW AND VERIFICATION	PM CAP DEVELOPMENT	<input type="text"/>		
03	STAKEHOLDER REGISTRY CONFIRMED	PM CAP DEVELOPMENT	<input type="text"/>		
04	COMMUNICATIONS PLAN UPDATE	PM CAP DEVELOPMENT	<input type="text"/>		
05	RISK REGISTER UPDATE	PM CAP DEVELOPMENT	<input type="text"/>		
06	SCHEDULE UPDATE	PM CAP DEVELOPMENT	<input type="text"/>		
07	HAZARDOUS BUILDING MATERIALS SURVEY	PM CAP DEVELOPMENT	<input type="text"/>		
08	PROCUREMENT & AWARD DESIGN	PM CAP DEVELOPMENT	<input type="text"/>		

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Team Dashboard



State of Utah

Division of Facilities and Construction Management

Capital Project Teams

Team = All

Manager	Name	Class	Projects			All Project Components			Checklist Components			Check Lists			Due Date Status				
			All	Full Kit	Queue	All	Pending	Active	Hours	CK List	<100%	100%	All	Date	Null	> 30	0-30	Lat	
Project Team: 1																			
138222	Darrell Hunting	CPM	7	1	0	42	0	42	8	8	8	0	83	0	83			1	
211207	Alex Alford	PM1	15	15	0	398	0	398	52	90	77	13	707	91	616	3	3	3	
194501	Christopher Ottley	PM1	33	16	0	448	0	448	51	96	80	16	690	95	595	5	1	10	
206305	Jon Vance	PM1	15	2	0	56	0	56	4	12	11	1	95	7	88			2	
211250	Mathew Daley	PM1	21	14	2	448	56	392	54	96	66	30	740	126	614	3	1	13	
104577	Tim Parkinson	PM2	50	12	6	531	28	503	61	111	89	22	874	88	786	1	2	12	
166306	Lucas Davis	PM3	35	13	0	364	0	364	40	78	65	13	611	85	526	1		12	
Projects assigned to Team 1			176	73	8	2287	84	2203	270	491	396	95	3,800	492	3,300	16	7	59	
			30%	30%	25%	100%	4%	96%	39	100%	81%	19%	31%	40%	5	39%	32%	27%	
Project Team: 2																			
173189	Matt Boyer	CPM	8	0	1	28	28	0	1	6	0	6	48	0	48			1	
108256	Matthias Mueller	PM2	15	1	2	112	28	84	13	22	15	7	213	7	206			3	
190400	Taylor Maxfield	PM2	7	2	1	112	42	70	12	22	11	11	212	41	171		2	1	
172200	Brian Bales	PM3	11	2	0	56	0	56	4	12	10	2	90	38	52			2	
111056	Craig Wessman	PM3	7	0	0	0	0	0	0	0	0	0	0	0	0				
Projects assigned to Team 2			48	5	4	308	98	210	30	62	36	26	563	86	47		0	2	7
			8%	2%	13%	100%	32%	68%	6	100%	58%	42%	5%	7%	0	0%	5%	3%	

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WIP Dashboard



State of Utah
Division of Facilities and Construction Management

Capital Project WIP Dashboard

Project Type: All; Manager: 104577; Team: All; Flag: All

Description	Hrs/Days	Queue	Program	Selection	Design	Docs	Bidding	Construct	Closeout	Held
Tim Parkinson								>30 days	<30 days	Late
	-9	3/19/19								
Ogden Weber Technical College New Outsid	4.00				19406240					
	0				3/28/19					
Ogden Weber Technical College Various Bu	4.00							19088240		
	18							4/15/19		
Wsu Engineering Tech Bldg Mep Design	4.00				19070810					
	34				5/1/19					
Wsu Stewart Stadium Sky Box And Suites W	4.00							19396810		
	126							8/1/19		
Wsu Chiller Plant Install Heat Exchanger	4.00							19400810		
	126							8/1/19		
Wsu Norda Engineering And Applied Scienc	4.00					19328810				
	146					8/21/19				
Tim Parkinson Projects:	61.00									18

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State of Utah
Division of Facilities and Construction Management

Manager = 104577

SUCCESS Queue Status

Project#	Description
104577	Tim Parkinson
19065150	Ogden Juvenile Courts Bldg Securit
19069810	Wsu Swenson Gym Fan Coil Replac
19085810	Wsu Various Buildings Ada Complia
19086810	Wsu Marriott Allied Health Bldg, Fac Ticket Booth K Vrf Differential Switc
19087810	Wsu Various Bldgs Concrete Replac
19417810	Wsu Annex 2 Testing Center And A Rec. Bldg.) Mou

6 Projects in Queue Status for Tim
6 Total Projects in Queue Stat

State of Utah SUCCESS Checklist Status

Manager = 166306; Project = ALL; Project Status = ALL

166306 Lucas Davis
Layton District Courts Bldg Hvac Rooftop Unit Curb

19076150 Replacement

Project Status: Construction

Status: ACTIVE % Complete: 0% Estimated: 12/27/18 Actual: 12/27/11 Days: 0 Completed: 12/27/11 Days: 0

Bidding Checklist Item Due Complete Days Completed By Responsibility Status

04 Communications Plan Update 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

05 Safety Plan 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

06 Haz Mat/Abatement 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

07 Qa/Qc Plan 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

08 Closeout Plan 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

09 Pre-Con Meeting 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

10 Hpts Implementation 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

11 Education Cnc 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

12 Inspections 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

12 Checklist Items for Bidding Without Due Dates 0 0%

Status: ACTIVE % Complete: 0% Estimated: 11/4/19 Actual: 12/27/11 Days: 18 Completed: 12/25/19 Days: 81

Construction Improvement Checklist Item Due Complete Days Completed By Responsibility Status

01 All Ris Answered -999 Lucas Davis Pm Cap Improvement Active

02 All Approved Poss Processed -999 Lucas Davis Pm Cap Improvement Active

03 All Submittals Approved -999 Lucas Davis Pm Cap Improvement Active

04 All Deferred Submittals Approved -999 Lucas Davis Pm Cap Improvement Active

05 O&M -999 Lucas Davis Pm Cap Improvement Active

06 Redlines / As-Built Drawings -999 Lucas Davis Pm Cap Improvement Active



State of Utah
Division of Facilities and Construction Management

SUCCESS Checklist Status

Manager = 166306; Project = ALL; Project Status = ALL

166306 Lucas Davis
Layton District Courts Bldg Hvac Rooftop Unit Curb

19076150 Replacement

Project Status: Construction

Status: ACTIVE % Complete: 0% Estimated: 12/27/18 Actual: 12/27/11 Days: 0 Completed: 12/27/11 Days: 0

Bidding Checklist Item Due Complete Days Completed By Responsibility Status

04 Communications Plan Update 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

05 Safety Plan 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

06 Haz Mat/Abatement 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

07 Qa/Qc Plan 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

08 Closeout Plan 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

09 Pre-Con Meeting 12/27/18 12/27/18 Lucas Davis Pm Cap Development Active

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05 O&M -999 Lucas Davis Pm Cap Improvement Active

06 Redlines / As-Built Drawings -999 Lucas Davis Pm Cap Improvement Active

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Target Outcomes

Complete 80% of
Projects In Fiscal Year!



Backlog gone...

TIME IS RUNNING OUT

[**692 : 14 : 49 : 23**]
Days Hours Minutes Seconds

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Questions & Answers

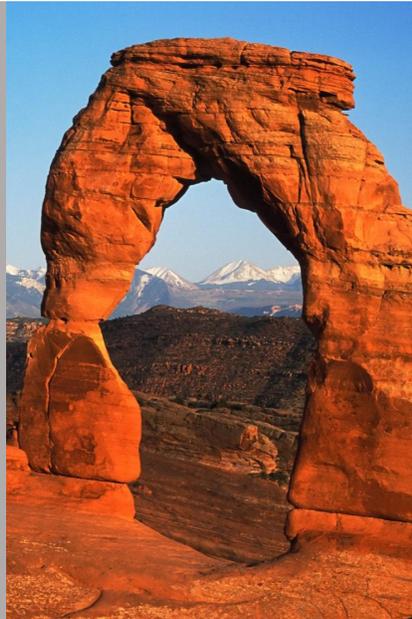


Jerry Sheets

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Resource Advantage Inc.



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