



# Planning & Scheduling Subcommittee Mid-Year Meeting

CPM Conference

Orlando, FL

January 22, 2019

[web.aacei.org](http://web.aacei.org)

**AACE**  
INTERNATIONAL

● Please sign in on the attendance sheet. Remember that someone else has to read your hand writing so please print as clearly as possible!

## ● WHO we are & WHAT we do....

- Sponsored by Technical Board, AAACE International
- Meets at least once a year at AAACE Annual Meeting
- Has its own community page on AAACE website
  - <https://communities.aacei.org/communities/community-home?CommunityKey=cbb7311a-7e8e-44a9-b42a-971844a141c7>
- Posts/participates in on-line technical discussions
- Elects a Chair (Moderator), Vice Chair, Secretary, & RP Coordinator
- Sponsor technical papers for annual meeting
- Create and develop Recommended Practices

## ● The Stats...

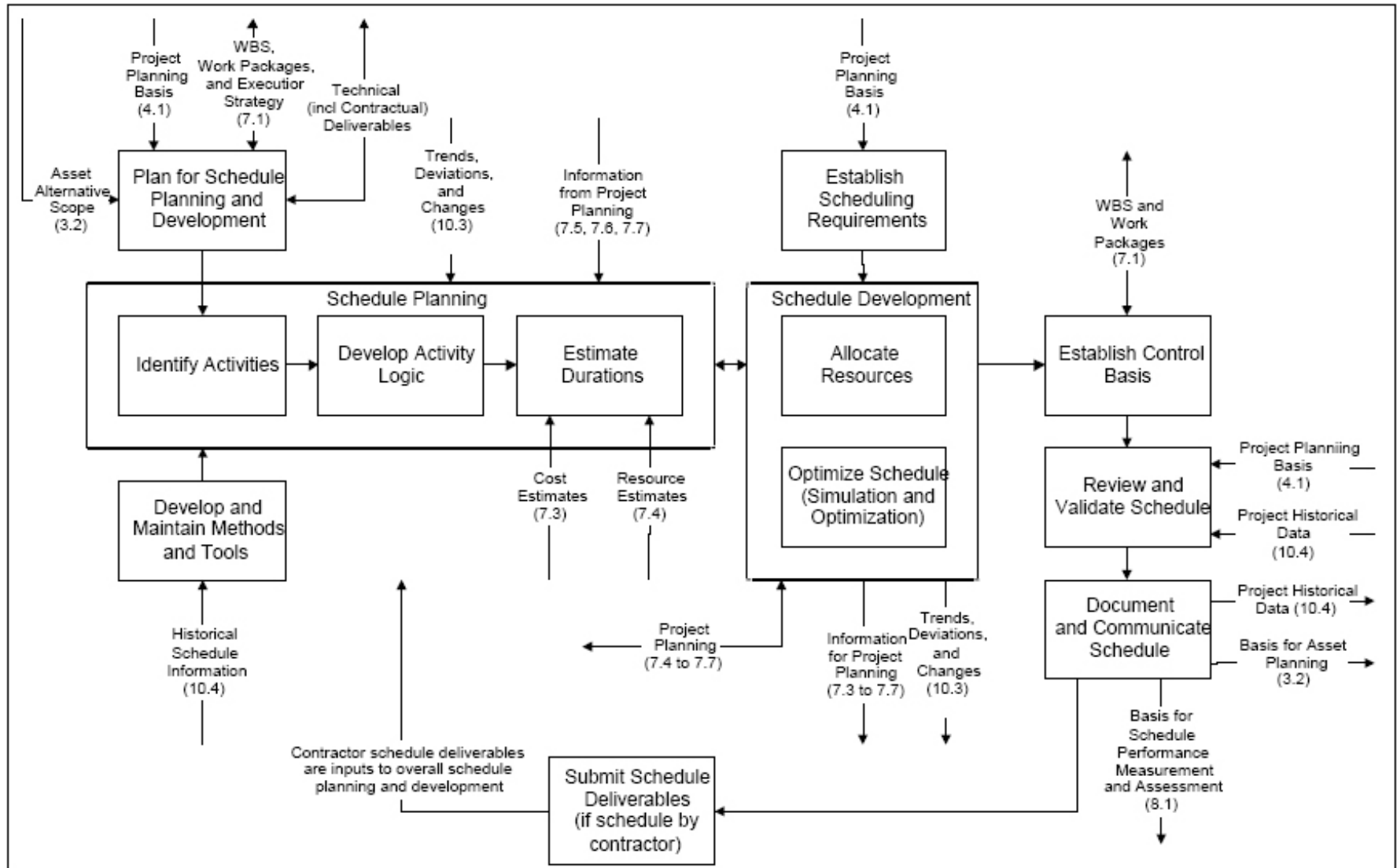
- **17** Presentations at 2019 Annual Meeting New record
  - 237 Presentations since 2000
- **1,297** Planning & Scheduling Professional (PSP) Certifications – **up 26 from June**
- **130** Certified Scheduling Technician (CST) Certifications – **Up 9 from June**
- **540** Members of P&S AAACE Community – **Up 74 from June**
- **221** Discussions on Community page since its launch in 2017
- **2** RP submitted to Committee for Review in 2018/2019
- **1** RP's currently under Tech Board Review
- **4** RP's currently under development
- **2** RP's published by Tech board in 2018/2019
  - 24 published RP's since 2004

- 26R-03 - Establishing Schedule Requirements (Model Scheduling Specifications) (*need new author to carry this forward*)
- PS-04 - Schedule Review/Validation/Quality Analysis – Glen Palmer
- PS-09 - Schedule Progress Reports & Reviews (*need new author to carry this forward*)
- PS-10 - Schedule Functional Levels by WBS – Michael Nosbisch
- PS-12 - Schedule Output, Deliverables and Feedback – Joseph Hellenbrand
- PS-13 - Schedule Constructability Assessment – Ted Douglas
- PS-17 - Schedule Management and Control – Brian Wilcox
- PS-22 - Schedule Narratives / Reports – Jeff Goodman, Jeff Milo, Joy Buenaflor, Chris Carson
- PS-28 - Construction Progress Measurement – Syd Daneshyar (*scoping document revisions needed*)
- PS-31 - Communication Periodic Time Performance – David Doughty
- PS-32 - Cost / Resource Loading – Paul Reeser, Pranab K. Deb

- Requested New Topics for Next Year
  - Early Completion Schedules

# RP Scope Gap/Overlap Analysis


Proposed Changes to Definitions in  
10S-90





- A group of subcommittee members are currently reviewing all published RP's to confirm correspondence with the TCM Framework
- Initial group of RP's was sent out for review in early November.
  - Review should be complete by the end of January.
- RP's are being graded by a 3 point scale
  - 0 = Not Covered
  - 1 = Brief Overview - not a source of learning on this topic
  - 2 = Thorough Coverage - Reader could learn details on this topic
- Each RP is being reviewed by 2 people and conclusions are being compared.
  - If there is a discrepancy between reviewers conclusions a 3<sup>rd</sup> reviewer is brought in to further review.

## Grading Sheet

RP #	RP Name	Date of RP	Reviewed By:		
<b>Framework Section</b>		<b>TCM Page #</b>	<b>Covered in RP?</b>	<b>RP Section Start Page(s)</b>	<b>Reviewer Notes</b>
<b>7.2 Schedule Planning and Development</b>		<b>165</b>			
<i>7.2.1 Description</i>					
		165			
7.2.1.1 Schedule Planning		165	0		
7.2.1.2 Schedule Development		165	0		
7.2.1.3 General Schedule Planning and Development Approaches and Techniques		166	0		
7.2.1.4 Program and Portfolio Schedules		167	0		
<i>7.2.2 Process Map for Schedule Planning and Development</i>					
7.2.2.1 Plan for Schedule Planning and Development		168	0		
7.2.2.2 Identify Activities		168	0		
7.2.2.3 Develop Activity Logic		169	0		
7.2.2.4 Estimate Durations		169	0		
7.2.2.5 Establish Schedule Requirements		169	0		
7.2.2.6 Allocate Resources		169	0		
7.2.2.7 Optimize Schedule (Simulation and Optimization)		170	0		
7.2.2.8 Establish Schedule Control Basis		170	0		
7.2.2.9 Review and Validate Schedule		170	0		
7.2.2.10 Document and Communicate Schedule		171	0		
7.2.2.11 Submit Schedule Deliverables		171	0		
7.2.2.12 Develop and Maintain Methods and Tools		171	0		
<i>7.2.3 Inputs to Schedule Planning and Development</i>		171	0		
<i>7.2.4 Output from Schedule Planning and Development</i>		172	0		
<i>7.2.5 Key Concepts and Terminology for Schedule Planning and Development</i>		172	0		
<i>AAACE International Recommended Practices</i>		173			
<b>Covered in RP?</b>					
0	Not Covered				
1	Brief Overview - not a source of learning on this topic				
2	Thorough Coverage - Reader could learn details on this topic				

- RP's currently under review
  - 14R-90 – Required Skills for a PSP
  - 20R-98 – Project Code of Accounts
  - 21R-98 – Project Code of Accounts for EPC
  - 23R-02 – Identification of Activities
  - 24R-03 – Developing Activity Logic
  - 27R-03 – Schedule Classification System
  - 32R-04 – Determining Activity Durations
  - 37R-06 – Schedule Levels of Detail
  - 38R-06 – Documenting the Schedule Basis
  - 39R-06 – Project Planning for Capital Projects
  - 45R-08 – Scheduling Claims Protection

- RP's currently under review (Continued)
  - 48R-06 – Schedule Constructability Review
  - 49R-06 – Identifying the Critical Path
  - 52R-06 – Prospective Time Impact Analysis
  - 61R-10 – Schedule Design
  - 70R-12 – Principles of Schedule Contingency Management
  - 78R-13 – Original Baseline Schedule Review
  - 82R-13 – Earned Value Management Overview
  - 84R-13 – Planning for Adverse Weather
  - 89R-16 – Management Summary Schedules
  - 91R-16 – Schedule Development
  - 92R-17 – Analyzing Near-Critical Paths
  - 93R-17 – Schedule Logs

RP #

14R-90

RP Name

Responsibility and Required Skills for a Project Planning and Scheduling Professional

Framework Section	TCM Page #	Reviewer 1	Reviewer 2	<i>If in conflict,</i> Reviewer 3	Final Disposition
		Covered in RP?	Covered in RP?	Covered in RP?	Covered in RP?
<b>7.2 Schedule Planning and Development</b>	<b>165</b>				
<i>7.2.1 Description</i>	<i>165</i>				
7.2.1.1 Schedule Planning	165	1	1	Consensus	1
7.2.1.2 Schedule Development	165	1	1	Consensus	1
7.2.1.3 General Schedule Planning and Development Approaches and Techniques	166	1	1	Consensus	1
7.2.1.4 Program and Portfolio Schedules	167	0	0	Consensus	0
<i>7.2.2 Process Map for Schedule Planning and Development</i>	<i>167</i>	<i>1</i>			
7.2.2.1 Plan for Schedule Planning and Development	168	1	1	Consensus	1
7.2.2.2 Identify Activities	168	1	1	Consensus	1
7.2.2.3 Develop Activity Logic	169	1	1	Consensus	1
7.2.2.4 Estimate Durations	169	1	1	Consensus	1
7.2.2.5 Establish Schedule Requirements	169	1	1	Consensus	1
7.2.2.6 Allocate Resources	169	1	1	Consensus	1
7.2.2.7 Optimize Schedule (Simulation and Optimization)	170	0	0	Consensus	0
7.2.2.8 Establish Schedule Control Basis	170	1	1	Consensus	1
7.2.2.9 Review and Validate Schedule	170	1	1	Consensus	1
7.2.2.10 Document and Communicate Schedule	171	1	1	Consensus	1
7.2.2.11 Submit Schedule Deliverables	171	1	1	Consensus	1
7.2.2.12 Develop and Maintain Methods and Tools	171	1	1	Consensus	1
<i>7.2.3 Inputs to Schedule Planning and Development</i>	<i>171</i>	<i>1</i>	<i>1</i>	<i>Consensus</i>	<i>1</i>
<i>7.2.4 Outputs from Schedule Planning and Development</i>	<i>172</i>	<i>1</i>	<i>1</i>	<i>Consensus</i>	<i>1</i>
<i>7.2.5 Key Concepts and Terminology for Schedule Planning and Development</i>	<i>172</i>	<i>0</i>	<i>1</i>		
<i>AAACE International Recommended Practices</i>	<i>173</i>	<i>1</i>			

- Early synopsis is that many of these RP's do not correspond with the TCM framework and need to be updated.
- Next Step
  - Complete reviews of all RP's
  - Submit findings to Tech Board
  - Prioritize RP's that need to be cleaned up
  - Find authors to clean up the RP's
- Once again the P&S subcommittee is leading the way by being the first subcommittee to perform this analysis.
- Jessica Colbert will be presenting at the 2020 AAACE Conference & Expo in Chicago to all other Subcommittees demonstrating how we conducted the analysis.

# WHITE HAT AWARD

Nominations are now  
open

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