

# **Regional Administration Guidance for PBM Pilot Program Projects**

This document provides guidance for staff regarding individual roles outlining initiation, approving, and communicating various work items during the course of CY 2016 PBM Pilot Program Projects. The following guidance provides for the consistent administration, communication, and transparency of decisions made by regional staff statewide.

## **Regional Maintenance Supervisor Role and Responsibility**

- Oversees the work of regional maintenance staff working on PBM projects.
- Ensures staff has proper training related to PBM.
- Responsible for staying within region allocated budget.
- Approves (signs) pay estimates/requests in Field Manager System.
- Approves/signs contract modifications (change orders).
- Reviews PBM program goals and provides necessary feedback.
- Verify DOT staff charges are NOT made to PBM projects. PDS/TSS staff (including testing charges) should charge the region's maintenance project id (0655-01,02,03,04,05-00).
- Ensure PBM contract change order impacts are reviewed, as needed.
- Organize the region's compilation of candidate pilot projects.
- Monitors the weekly report of PBM vouchers, expenditures, and purchase order information. Reports compiled centrally by BHM and distributed to regions via Sharepoint.
- Monitor the weekly report of PBM contract quantities distributed to regions via Sharepoint.
- Support the collection of project data for PBM performance measure assessment (like MQI).
- Provide all PBM project evaluation and regional self-assessment data for Annual Report.
- Approves/signs purchase order for state purchased materials.

## **Regional Maintenance Engineer Role and Responsibility**

- Oversees the work of Maintenance Coordinators working on PBM projects.
- Responsible for review and establishment of project limits and scope.
- Responsible for review/approval of PBM project estimates.
- Responsible for review/approval and submittal of PBM contract documents to BHM.
- Attends and facilitates the pre-project meetings.
- Provides guidance to Maintenance Coordinator on calculating/monitoring "burn rate."
- Reviews contract modifications (change orders) and forwards to supervisor for approval.
- Help facilitate dispute resolution procedures.
- Reviews PBM goals and provides necessary feedback.
- As directed, participate in the development of the region's candidate pilot project listing, the selection of candidate projects for implementation, the monitoring and review of weekly reports, and the creation and collection of performance measurement data.
- As directed, provide project review to Supervisor for Annual Report.

- Review purchase orders for state supplied materials and forwards the purchase order to the Maintenance Supervisor for approval.

#### Regional Maintenance Coordinator Role and Responsibility

- Reviews materials documentation.
- Responsible for overseeing the day-to-day work of County Highway Departments working on PBM projects.
  - Attends the pre-project meeting (Includes: reviewing DT1349, WisLCS entries, any notifications such as press releases, schedule, etc...).
- Visits the work site at the beginning of the day (or early in the day) if at all possible. Checks in with the county work crew as necessary to check on status. Is NOT required to be at the project site for duration of project.
- Should be available via phone to answer any project related questions while in work status.
- Works out any project issues and/or reports them to the Regional Maintenance Engineer.
- Tracks and reports daily quantities and all other diary information for entry into Field Manager. Entries into Field Manager should be completed weekly.
- Monitors the “burn-rate” of material quantities being used on the project and reports overages from the project plan greater than 10% to Regional Maintenance Engineer.
- Works with county highway departments in drafting contract modifications to submit to Regional Maintenance Engineer.
- Completes the final paperwork and estimates to final and close out projects.
- As directed, participate in the development of the region’s candidate pilot project listing, the selection of candidate projects for implementation, the monitoring and review of weekly reports, and the creation and collection of performance measurement data.
- Coordinates with county highway department to determine when state purchased materials for bridge work will be required. Fills out the purchase order form and submits it to the Regional Maintenance Engineer.