

Scope Management



There are typically two types of scopes for Project Manager's to manage on a project:

1. **Project Scope:** defines the overall goal/objective of the project. This generally includes why the project is taking place, the geographical boundaries or "limits", the timeframe for the project, the estimated costs, and defines what the project needs to achieve, improve, or mitigate (i.e., the purpose and need, identified improvements needed, or deficiencies to be addressed). This is typically determined through feasibility studies and the prioritization process. The Project Scope can greatly influence the Scope of Service.
2. **Scope of Service:** defines the efforts and deliverables necessary to perform the work desired and within a set timeframe. Typically, this includes planning and or design work or various technical and outreach components depending on the needs of the project.

Managing these scopes is essential to ensuring all project team members are on the same page with meeting the project goals and expectations. This effort often extends throughout the life of the project – from PDN Stage 1 to Stage 4 (Letting) or 5 (Construction).

Why Important

Project Scope

- Defines the expectations of the project to ensure the improvements meet the purpose and the need and satisfy project goals.
- A defined project scope will help the team understand the major components and level effort needed to deliver the project.
- Minimize scope creep and risk of expanding beyond the planned limits or objectives, reducing potential for project cost increases and schedule delays. It may help to identify what is not included in the project to help reduce scope creep.
- Provides guidance on the deliverables, activities, and tasks required to deliver the project.

Scope of Service


- Clearly defines the work (activities, tasks, and deliverables) a firm will be performing on a project.
- Documents assumptions and limitations associated with the firm's anticipated services.
- Provides the basis for holding the project team accountable.
- The work detailed in the scope is used to develop the Workday estimate and is a portion of the PE budget in which annual cost projections are required.




Clearly defined scopes can keep a project moving forward whereas ambiguous scopes can delay a project and lead to disputes.

Key PM Responsibilities

Project Scope




Common Goal
Ensure all team members are working toward the same goal and Purpose & Need established.




Minimize Scope Creep
Ensure project scope modifications are vetted and justified.


Scope of Services



Review Scope of Service
Ensure that deliverables and task expectations align with needs of the project.



Negotiate with Firm
Coordinate with NCDOT disciplines to negotiate the work needed to be performed.



Timely Notice to Proceed
Coordinate closely with Business Officer/Admin to ensure Notice to Proceeds are received timely.


Key Things to Consider

Project Scope

- Do the deliverables align with meeting the project goals and improvement expectations?
- Have the project stakeholders/local partners been engaged to ensure expectations are met and scope creep is minimized?
- Has any scope creep occurred that may impact prioritization and/or funding?
- If an additional item is requested - expanding the scope, is it required to meet the project purpose and need or is it considered a betterment?
- Are all team members engaged and coordinating continuously with each other?
 - o Is communication freely flowing amongst team members? (PM are not having to pass the information from team member to team member.)

Scope of Service

- Is the Scope of Service adequate to meet the intent of the Project Scope?
- Does the timeline for the deliverables align with the timeline in the Project Scope?
- Are the expectations on how the project will be delivered clear?
 - o Contracting type
 - o Roles and Responsibilities
 - o Deliverables
- Is QA/QC included in the scopes of services?
- Are the PDN deliverables and activities in the Scope of Service tailored to meet the project needs?



Does the scope clearly define the expectations of the deliverables?

Best Practices & Common Pitfalls

Best Practices	Common Pitfalls
<p><u>Project Scope</u></p> <ul style="list-style-type: none"> ✓ Communicate clear expectations at scoping meetings. <p><u>Minimizing Scope Creep</u></p> <ul style="list-style-type: none"> ✓ Ensure the project scope is clear and understood by all. ✓ Establish a clear purpose & need, maintain focus on it. Improvement requests may be beyond what is needed to meet purpose and need; evaluate before incorporating. ✓ Communicate early and often with local stakeholders and municipalities. ✓ Account for Complete Streets. <p><u>Scope of Services</u></p> <ul style="list-style-type: none"> ✓ Provide timely reviews of scope of services. ✓ Proactively negotiate work needed when necessary and appropriate. ✓ Verify that the scope of service is in line with overall expectations. ✓ Keep in mind how long the Notice to Proceed process takes. ✓ Ensure key assumptions are noted for each discipline. ✓ Clearly indicate what is not included. 	<p><u>Project Scope</u></p> <ul style="list-style-type: none"> ✗ Unclear goals or purpose & need. ✗ Differing project goals throughout the project, everyone not on same page. <p><u>Scope Creep</u></p> <ul style="list-style-type: none"> ✗ Ambiguous project scope. ✗ Stakeholders not involved early in the project. ✗ Poor Communication. ✗ Unrealistic timelines. ✗ Last minute modifications or requests. <p><u>Scope of Services</u></p> <ul style="list-style-type: none"> ✗ Approving scope that is not detailed enough. ✗ Holding up approval of scope for preferential edits. ✗ Allowing prime consultants to use unapproved subconsultants to work on LSC. ✗ Delaying the project by having delayed notice to proceeds. ✗ Waiting too late to start the scoping & Notice to Proceed process for supplemental work. ✗ Approving scope of services that does not meet the Project Scope

Tools

[Scope of Service Generator](#)

Definitions

- Scoping:** *The process of developing the project scope or scope of service.*
- Project Scope:** *The overall goal/objective of the project, outlining the work that needs to be completed, the resources required, and the timeline for completion.*
- Scope of Service:** *The efforts and deliverables needed for a project team to perform within a set timeframe. Also referred to as Scope of Work.*
- Scope Creep:** *Continuous or uncontrolled changes to the project scope beyond what was originally programmed in the STIP or contracted with the firm.*
- Activity:** *The overall action(s) completed by a technical discipline. Activities are the boxes on the PDN diagram represented by an identifier (ie 2HY2) and can be completed in parallel or sequentially.*
- Task:** *The step(s) and process(es) necessary to complete an activity. These are identified in the "Deliverables" table for each Activity in the PDN.*