



PEPS Contract Utilization

2022 PEPS Conference

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November 30, 2022



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- Questions & Contact Information



HELP
#EndTheStreakTX

End the streak of daily deaths on Texas roadways.

TxDOT.gov (Keyword: #EndTheStreakTX)



#EndTheStreakTX Toolkit

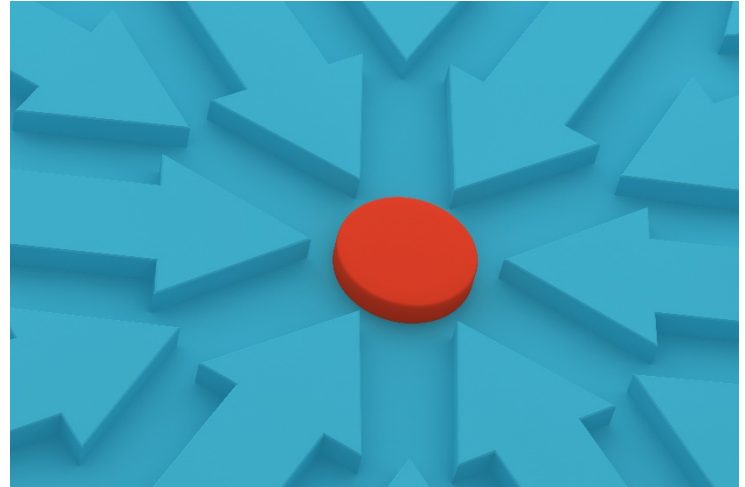


Center for Contract Utilization and Its Function



Initial Focus

Track and report out *Contracts with Zero Work Authorizations*



Standard Operating Procedures (SOP) were developed; and, approved 2/8/2021 to stand up the *Support Center of Contract Utilization*



Purpose: Optimize utilization of indefinite deliverable contracts for professional engineering and surveying services

- Identify contracts with funds and time remaining to issue work
- Consider Contracts with Placeholders (PH) older than 120 working days for possible re-assignment
 - Placeholders are assigned when districts/divisions make a request for a work authorization by submitting a completed Identification of Contract Need form to their PEPS Service Center.

Communication (How) & Distribution (Who)

Work as a liaison between internal and external customers

Secondary responsibilities

Secondary Responsibilities of CCU.....



Procurement Analysis

QA/QC data, tag and notify Service Centers for action

Prepare stand-alone shoutouts for contracts. Triggers?



Quarterly District Meetings → Contract portfolio, sharing contracts & pending needs.

Quarterly Consultant Meetings → Contract portfolio, WA assignment processes, confirm contract balances and decommitment process.

Identification of metrics to reconcile terminology misalignment

**Dashboard Tools Used by
Center of Contract Utilization
(CCU)**



- *“Contract Utilization Tracker”* (CUT) (hourly refresh)
Access: Limited to PEPS Senior Leadership and PEPS –CCU
- *“Contract & WA Utilization”* (live time refresh) aka PEPS Capacity Tracker (PCT)
Access: PEPS Only
- *“Zero Committed WA”* (updated monthly)
Access: PEPS Only
- State-wide reach-out to District Engineers, Director of TP&D’s, and individuals with discipline specific oversight to highlight contract availability monthly or as needed.

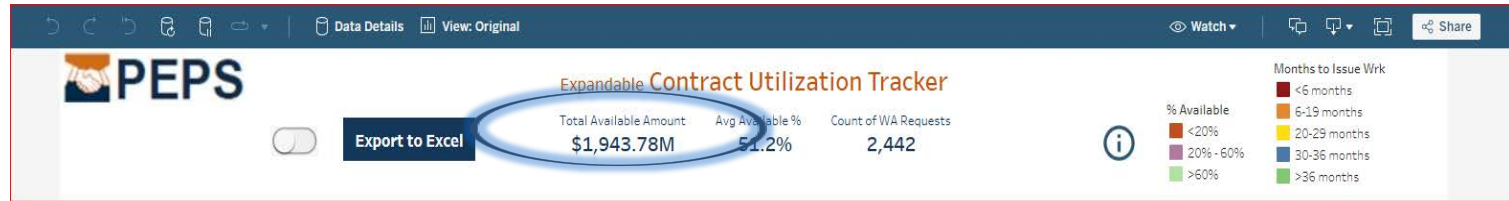




Two Contract Utilization dashboards use different definitions.

Contract Utilization Tracker (CUT) used by CCU Manager

“Total Available Capacity” does NOT DEDUCT the assigned placeholders




Contract & WA Utilization (PEPS only) aka **PEPS Capacity Tracker (PCT)** used by Service Center Managers

“Total Capacity Amount” DEDUCTS the assigned placeholders from contract capacity





- **Three metrics defined to**  **Alignment** between the two dashboards
 1. Identify placeholders assigned by discipline (no limitations)
 2. Sufficient funds left to issue another WA under original contract?
 3. Identify Contracts scheduled to terminate within 2-3 Fiscal Years.
- **Metric #2** can be redefined based on prior Fiscal Year trends.
- **Metrics #2** and **#3** are not necessarily applied to each discipline.

Common Features of Some of the Tableau Dashboards.....



Blue Banner

- Customize View
- Set an Alert
- Export to Excel
- Share with others

WAs In Process | Supplemental Work Authorizat... | Supplemental Agreement file... | Historical WA Processing Days

PEPS Collapsible WAs In Process

Count of WA: 13 Total Amount: \$22,273,195

Filters: WA Service Center (Rural Service Center), WA DD ((All)), WA over 50 days ((All)), Contract+WA ((All)), Contract Discipline (PS&E), Contract Type ((All)), Recent Milestone (YES)

WA Service Center	WA DD	Contract+WA	Firm Name	Contract Discipline	Last Day To Issue Work	Contract Totl Amt	WA Totl Amt	WA Rqsted By	WA PM	Days from Request
Rural Service Center	ABL - 08	369IDP5105 - 8		PS&E	6/30/2024	\$10,000,000	\$2,054,647	Julie Rogers	Natalie Cox	55
		369IDP5105 - 9		PS&E	6/30/2024	\$10,000,000	\$682,370	William Dezern	David Krause	38
	AMA - 04	369IDP5101 - 4		PS&E	6/29/2024	\$10,000,000	\$1,700,000	Stephanie Wiggins	Brandon Billbrey	39
		369IDP5102 - 12		PS&E	6/29/2024	\$10,000,000	\$393,662	Stephanie Wiggins	David Miller	33
		158IDP5011 - 7		PS&E	2/2/2023	\$10,000,000	\$1,500,000	Stephanie Wiggins	Damen Ratliff	12
	CHS - 25	369IDP5098 - 3		PS&E	6/19/2024	\$10,000,000	\$1,600,000	Stephanie Wiggins	Damen Ratliff	6
		368IDP5094 - 4		PS&E	11/8/2022	\$5,000,000	\$350,000	Ryan Reid	Ryan Reid	4
		158IDP5010 - 7		PS&E	2/4/2023	\$10,000,000	\$5,048,500	Charles B Steed	Ryan Reid	26
	ODA - 06	158IDP5012 - 8		PS&E	2/24/2023	\$10,000,000	\$1,000,000	Joe Villalobos	Joe Villalobos	12
	SJT - 07	369IDP5100 - 3		PS&E	7/14/2024	\$10,000,000	\$814,493	Nicholas J Greenly	Nicholas J Greenly	58
		369IDP5101 - 3		PS&E	6/29/2024	\$10,000,000	\$4,000,000	Nicholas J Greenly	Thomas Gatlin	45
	WFS - 03	369IDP5102 - 11		PS&E	6/29/2024	\$10,000,000	\$1,129,524	Krista Moreira	Krista Moreira	56
		020IDP5006 - 3		PS&E	3/1/2025	\$5,000,000	\$2,000,000	Kyle J Poirot	Kyle J Poirot	9

0 20 40 60 Days from Request

Contract Utilization Tracker (CUT) Tableau Dashboard



- Slide button to Green and select filters
- Long form dashboard displays contract level by discipline in the primary view
WA detail view
- Scroll down to view WA details

Dashboard for CCU-Contract Utilization Tracker (CUT)



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 Data Details View: Original 👁 Watch 🗨 📄 📄



Expandable Contract Utilization Tracker

Total Available Amount **\$1,952.62M**
 Avg Available % **51.5%**
 Count of WA Requests **2,442**



% Available
■ <20%
■ 20% - 60%
■ >60%

Months to Issue Wrk
■ <6 months
■ 6-19 months
■ 20-29 months
■ 30-36 months
■ >36 months

Export to Excel

- Discipline (All)
- Contract SVC (All)
- DD (All)
- Count of WA (All)
- WA Assignment Process (All)
- WA Status (Multiple values)
- Preliminary? (All)
- Prime Firm? (Y)
- Firm Name (All)
- Contract Nbr (All)
- Able to Issue Work (Yes)
- Contract Type (ID)
- Available Amt (All)
- Months to Issue Wrk (All)

DD	Procu Wave	Proc SVC	Contract Number	Count of WA	Last Day To Issue Work	WA Assignment Process	Firm Name	Percent Available	Available Amount	Avg Months to Issue Work
38	FY20, W1	DIV	380IDP8001	5	6/19/2024	Rotation	[Redacted]	45.6%	\$1,823,821	21
			380IDP8002	4	6/30/2024	Rotation		61.9%	\$2,477,801	21
			380IDP8003	2	6/15/2024	Rotation		23.7%	\$948,563	21
			380IDP8004	1	7/21/2024	Rotation		37.5%	\$1,498,177	22
			380IDP8005	4	7/21/2024	Rotation		60.2%	\$2,409,277	22
			380IDP8006	4	5/15/2024	Rotation		61.3%	\$2,453,890	20
			380IDP8007	2	6/11/2024	Rotation		66.6%	\$2,665,686	21
			380IDP8008	4	7/15/2024	Rotation		66.7%	\$2,666,479	22
			380IDP8009	2	7/21/2024	Rotation		56.5%	\$2,261,602	22
FY21, W4	DIV	381IDP8001	4	11/16/2025	Rotation		0.1%	\$13,229	38	
47	FY19, W3	DIV	479IDP8001	4	11/6/2023	Rotation		26.8%	\$402,374	14
			479IDP8002	2	10/27/2023	Rotation		44.4%	\$666,688	13
			479IDP8003	7	12/16/2023	Rotation		60.3%	\$905,134	15
18	FY18, W2	USC	368IDP5068	9	1/22/2023	Tier Review		37.5%	\$1,875,992	4
			368IDP5072	5	1/31/2023	Tier Review		13.6%	\$677,760	4
	FY20, W3	DAL	360IDP5083	1	1/6/2025	Tier Review		64.8%	\$1,943,433	28
			360IDP5084	0	12/23/2024	Tier Review		100.0%	\$3,000,000	27
			360IDP5086	1	2/3/2025	Tier Review		67.4%	\$2,021,153	29
360IDP5090	1	2/9/2025	Tier Review		11.4%	\$343,209	29			
24	FY19, W4	ELP	369IDP5120	4	4/9/2024	Tier Review		3.4%	\$123,655	19
			369IDP5121	4	4/9/2024	Tier Review		56.6%	\$2,036,809	19
			369IDP5124	4	4/9/2024	Tier Review		11.7%	\$409,203	19

View WA Details By Selecting Any Content in the View Above As A Filter

Rqst to Exec or Today
 Preliminary? ■ <90days

**Monthly Reports Issued by CCU
to Districts, Divisions & Service
Centers**



- ***“Remaining Contract Capacity by Discipline”***
- **Data Source: *CUT (data refresh every hour)***
 - Disciplines Reported: 32
 - Metrics are applied where applicable
 - Trends are progressing downward in all areas
 - ✓ September 2021: \$2.492B (Unadjusted) before metrics identified
 - ✓ October 2022: \$1.944 B (Unadjusted) or \$1.699B (Adjusted)
 - ✓ Represents a ***21.96% reduction*** (rounded) in capacity over the past year
 - Are there fluctuations?

Discipline Workbook Tab



- Export the results into Excel, reformat and produce individual workbook tabs
- Discipline Workbook Tab (*ex: Engineering, Other*)

Contract Discipline	Contract SVC	DD	Procu Wave	Proc SVC	Contract Number	Count of WA	Last Day To Issue Work	WA Assignment Process	Contract Exec D	Contract Term D	Mths to Issue Wrk	Contract Toll Amt	Percent Available	Remaining Available Balance
Engineering Other	Houston Service Center	12	FY20, W2	USC	360IDP5055	3	8/7/2024	Tier Review	8/7/2020	8/7/2025	23	\$10,000,000	17.2%	\$1,719,731.72
Engineering Other	Houston Service Center		FY21, W4	HOU	121IDP5009	2	12/20/2025	Tier Review	12/20/2021	12/20/2026	39	\$3,500,000	100.0%	\$3,500,000.00
Engineering Other	Houston Service Center				121IDP5010	2	11/16/2025	Tier Review	11/16/2021	11/16/2026	38	\$3,500,000	91.2%	\$3,192,797.77
Engineering Other	Service Center for Divisions	48	FY19, W4	DIV	489IDP5009	1	3/27/2024	Rotation	3/27/2020	3/27/2025	18	\$3,000,000	92.0%	\$2,759,744.00
Engineering Other	Service Center for Divisions				489IDP5010	2	4/15/2024	Rotation	4/15/2020	4/15/2025	19	\$3,000,000	61.6%	\$1,846,705.81
Engineering Other	Service Center for Divisions		FY22, W2	DIV	482IDP5001	1	6/24/2026	Rotation	6/24/2022	6/24/2027	45	\$3,000,000	70.4%	\$2,110,555.74
Engineering Other	Service Center for Divisions	58	FY20, W3	DIV	580IDP5001	2	9/30/2024	Rotation	10/7/2020	9/30/2025	24	\$5,000,000	74.6%	\$3,732,060.19
Engineering Other	Service Center for Divisions	82	FY22, W2	DIV	822IDP5001	1	4/27/2025	Rotation	4/27/2022	4/26/2027	31	\$500,000	45.2%	\$225,817.17
Engineering Other	Service Center for Divisions				822IDP5002	1	4/20/2026	Rotation	4/20/2022	4/20/2027	43	\$500,000	41.0%	\$204,919.08
Engineering Other	Service Center for Divisions	88	FY18, W3	DIV	888IDP5008	5	9/10/2022	Rotation	9/10/2018	9/10/2023	0	\$1,000,000	60.3%	\$602,500.00
Engineering Other	Service Center for Divisions		FY19, W3	DIV	889IDP5032	5	10/9/2023	Tier Review	10/9/2019	9/30/2024	13	\$2,500,000	41.1%	\$1,027,010.79
Engineering Other	Service Center for Divisions				889IDP5033	8	10/9/2023	Tier Review	10/9/2019	9/30/2024	13	\$2,500,000	44.0%	\$1,099,903.94
Engineering Other	Service Center for Divisions		FY21, W3	DIV	881IDP5005	2	8/12/2025	Tier Review	8/12/2021	8/12/2026	35	\$3,000,000	73.3%	\$2,199,154.31
Engineering Other	Service Center for Divisions				881IDP5006	0	9/17/2025	Tier Review	9/17/2021	9/17/2026	36	\$3,000,000	100.0%	\$3,000,000.00
Engineering Other	Urban Service Center	56	FY20, W2	USC	360IDP5056	3	8/12/2024	Tier Review	8/12/2020	8/12/2025	23	\$10,000,000	31.6%	\$3,162,092.97
Actual						15	Unadjusted Actual						\$30,382,993.49	
Contracts with Insufficient Funds						0	Contracts with Insufficient Funds						0	
Contracts with Placeholders						3	Contracts with Placeholders						\$3,100,000.00	
Contracts Terminate FY22, 23 & 24						0	Contracts Terminate FY22, 23 & 24						0	
Remaining Contracts						11	Adjusted Actual						\$26,680,493.49	
Contract Roll-Off This Month						1	Contract Roll-Off This Month						\$602,500.00	

Summary Table for Remaining Capacity by Discipline



- Summary Table of Contracts (32 disciplines) with Metrics applied as applicable

	Number of Contracts					
Discipline	Contracts Terminating FY22, 23 & 24	Contracts with Insufficient Funds	Contracts with Placeholder	Contract Roll-Off This Month	Contracts with No Adjustments	Total Number of Contracts
Architecture-DIV	Metric Not Applied	0	2	0	11	13
On_Off Bridge Replacement	21	3	12	0	14	50
Bridge Inspection-DIV	Metric Not Applied	0	0	0	0	0
Stand-Alone Bridge Design	0	0	1	0	10	11
CEI	15	17	18	0	27	77
Grand Total	69	51	136	10	507	773



Summary Table for Remaining Available Capacity

Remaining Adjusted Capacity

	Remaining Available Capacity					
Discipline	Amount Due to Contracts Terminating FY22, 23 & 24	Amount Due to Contracts with Insufficient Funds	Amount Due to Contracts with a Placeholder Amount	Contract Roll-Off This Month	Amount Due to Contracts with No Adjustments	Total Amount of Remaining Capacity by Discipline
Architecture-DIV	Metric Not Applied	\$0.00	\$1,670,000.00	\$0.00	\$20,036,164.34	\$21,706,164.34
On_Off Bridge Replacement	\$39,488,923.93	\$123,780.07	\$18,308,166.00	\$0.00	\$43,385,292.79	\$101,306,162.79
Bridge Inspection-DIV	Metric Not Applied	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Stand-Alone Bridge Design	\$0.00	\$0.00	\$100,000.00	\$0.00	\$51,851,140.17	\$51,951,140.17
CEI	\$30,094,213.59	\$1,330,545.89	\$26,053,631.74	\$0.00	\$115,385,616.85	\$172,864,008.07



Grand Total	\$119,899,353.75	\$2,609,592.02	\$220,414,451.63	\$4,125,952.42	\$1,635,387,510.16	\$1,982,436,859.98
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■ ***ALERT: Contracts with Zero WA***

- Data Source: ***Contract Utilization Tracker***
- Data Confirmed Using Tableau dashboard “***Zero Committed WA***” (updated monthly)
- Run date: ***November 1, 2022***
- Data fluctuates from month to month
 - ✓ Tracking began September 2021: 178 contracts for a capacity of \$783.7M (unadjusted)
 - ✓ End of October 2022: 84 contracts for a capacity of \$432,500,000 (unadjusted)
 - ✓ Represents a **52.81%** reduction in contracts and **44.81%** reduction in capacity



Slide button to the right on the dashboard and apply filter “Count of WA” = Null or 0



- ✓ Confirm the data shows no placeholders by scrolling down to View WA Details.
- ✓ Export the results to Excel
- ✓ Analyze data, prepare individual workbook tabs by discipline and summarize

Data Dump into an Excel report (results are in a reformatted format)



Contract Discipline BRG On/Off Replacement	Contract SVC Rural Service Center	DD 36	Procu Wave FY20, W2	Proc SVC USC	Contract No. 360IDP5102	Count of WA 0	Last Day To Issue Work 8/27/2024	WA Assignment Process Tier Review	Last Day to Issue Work 8/27/24	Cntrct Exec Dt 8/27/2020	Cntrct Term Dt 8/27/2025	Months left to Issue a new WA	Cntrct Totl Amt \$5,000,000	% Available 100.0%	# of working days from Contract Execution 531
Bridge Design	Urban Service Center	36	FY19, W4	DIV	369IDP5080	0	11/26/2023	Tier Review	11/26/23	11/26/2019	11/26/2024	12	\$5,000,000	100.0%	707
Bridge Design	Urban Service Center	88	FY19, W4	DIV	369IDP5077	0	12/14/2023	Tier Review	12/14/23	12/14/2019	11/30/2024	13	\$5,000,000	100.0%	696
Bridge Inspection	Service Center for Divisions	88	FY22, W3	DIV	882IDP5041	0	10/5/2025	Rotation	10/5/25	10/5/2022	10/4/2027	35	\$7,500,000	100.0%	19
Bridge Inspection	Service Center for Divisions	88	FY22, W3	DIV	882IDP5042	0	10/14/2025	Rotation	10/14/25	10/14/2022	10/12/2027	35	\$7,500,000	100.0%	12
Bridge Inspection	Service Center for Divisions	88	FY22, W3	DIV	882IDP5044	0	10/5/2025	Rotation	10/5/25	10/5/2022	10/4/2027	35	\$7,500,000	100.0%	19
Bridge Inspection	Service Center for Divisions	88	FY22, W3	DIV	882IDP5045	0	10/21/2025	Rotation	10/21/25	10/21/2022	10/7/2027	35	\$7,500,000	100.0%	7
Bridge Inspection	Service Center for Divisions	88	FY22, W3	DIV	882IDP5046	0	10/4/2025	Rotation	10/4/25	10/4/2022	10/4/2027	35	\$7,500,000	100.0%	20
Bridge Inspection	Service Center for Divisions	88	FY22, W3	DIV	882IDP5048	0	10/11/2025	Rotation	10/11/25	10/11/2022	10/4/2027	35	\$7,500,000	100.0%	15
Bridge Inspection	Service Center for Divisions	88	FY22, W3	DIV	882IDP5050	0	10/21/2025	Rotation	10/21/25	10/21/2022	10/7/2027	35	\$7,500,000	100.0%	7
Bridge Inspection	Service Center for Divisions	88	FY22, W3	DIV	882IDP5051	0	10/11/2025	Rotation	10/11/25	10/11/2022	10/7/2027	35	\$7,500,000	100.0%	15
Bridge Inspection	Service Center for Divisions	88	FY22, W3	DIV	882IDP5053	0	10/27/2025	Rotation	10/27/25	10/27/2022	11/1/2027	35	\$7,500,000	100.0%	3

Contracts with Zero Work Authorizations Summary Table



- Capture the results from Individual Workbook tabs (November 1, 2022)
- Outcome of 18 disciplines shown in Summary Table

CONTRACTS WITH ZERO WORK AUTHORIZATIONS (RUN DATE 11/1/2022)					
Discipline	# of Contracts- No Placeholders	Contract Amt- No Placeholders	# of Contracts with Placeholders	Contracts Terminating in FY 22, 23 & 24	Amt of Contracts Due to Term FY 22, 23 & 24
On/Off System Bridge Replacement	1	\$5,000,000.00	0	0	\$0.00
Stand-Alone Bridge Design	2	\$10,000,000.00	0	Metric Not Applied	Metric Not Applied
Bridge Inspection-DIV	9	\$67,500,000.00	0	0	\$0.00
CEI	1	\$3,000,000.00	0	0	\$0.00
Stand-Alone Drainage Design	6	\$12,000,000.00	0	Metric Not Applied	Metric Not Applied
Geotechnical	3	\$6,000,000.00	0	Metric Not Applied	Metric Not Applied
Stand-Alone Geotechnical Complex	6	\$18,000,000.00	0	Metric Not Applied	Metric Not Applied
Materials Engineering	9	\$21,000,000.00	0	Metric Not Applied	Metric Not Applied
PS&E	3	\$19,000,000.00	0	0	\$0.00
Stand-Alone Roadway Design	4	\$20,000,000.00	0	Metric Not Applied	Metric Not Applied
Schem_ENV_PS&E	1	\$10,000,000.00	0	0	\$0.00
Schematic/Environmental	19	\$175,000,000.00	0	0	\$0.00
Stand-Alone Signing, Pavement Markings & Signalization	5	\$15,000,000.00	0	Metric Not Applied	Metric Not Applied
Surveying	6	\$12,000,000.00	0	Metric Not Applied	Metric Not Applied
Traffic & Revenue-DIV	1	\$8,000,000.00	0	Metric Not Applied	Metric Not Applied
Stand-Alone Traffic Control Complex	7	\$21,000,000.00	0	Metric Not Applied	Metric Not Applied
Traffic Engineering	1	\$10,000,000.00	0	Metric Not Applied	Metric Not Applied
Grand Total	84	\$432,500,000.00	0	0	\$0.00





■ Alert: Contracts with Five Months Or Less to Issue a New WA (Run date 9/13/2022)

■ **Data Source:** *Contract Utilization Tracker* (metrics are applied where applicable)

■ **Disciplines Reported On:** 12 (varies monthly) with Placeholders (PH)

■ **Critical data:**

- Last Day to Issue Work,
- Contract Termination Date
- Remaining Capacity
- Preliminary Amount=PH with \$
- 0 =No Placeholder
- WA assignment process
- Number of Months left prior to contract roll-off

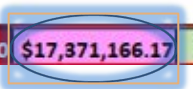
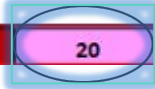
Discipline Workbook Tab (example Geotechnical)

Contract Discipline	Contract SVC	DD Procu Wave	Proc SVC	Contract Number	Count of WA	Last Day to Issue Work	WA Assignment Process	Contract Exec Date	Contract Term	<5 months	Contract Totl Amt	Percent Available	Preliminary Amount		
Geotechnical	Austin Service Center	14	FY18, W4	USC	388IDP5122	9	1/31/2023	Rotation	1/31/2019	1/31/2024	4	\$3,500,000	20.2%	\$706,430.93	0
Actual # of Contracts Unadjusted											1	Total Unadjusted Contract Amount			\$706,430.93
Number of Contracts With Placeholders											0	Total Placeholder Amount			\$0.00
# of Contracts- Insufficient Funds to Issue a WA											0	Amount of Insufficient Funds to Issue a WA			\$0.00
Remaining # of Contracts											1	Adjusted Contract Capacity			\$706,430.93
Contract Roll-Off											Amount of Contract Capacity rolling OH				
											Jan (4)				
											1				\$706,430.93



- Adjusted contracts to be lost = 51 for an amount of \$67,224,729.50
- Note: 20 contracts have placeholders for a total amount of \$17,371,166.17

Discipline	Number of Contracts				Remaining Available Capacity			
	Remaining # of Contracts	# Of Contracts With Insufficient Funds	Contracts with Placeholders	Total Number of Contracts	Adjusted Amount of Remaining Capacity by Discipline	Contract Capacity With Insufficient Funds	Placeholder Amount	Total Actual Amount of Remaining Capacity by Discipline
On/Off System Bridge Replacement	6	Metric Not Applied	3	9	\$10,166,118.21	Metric Not Applied	\$3,356,166.17	\$13,522,284.38
CEI	2	2	0	4	\$660,908.34	\$12,610.21	\$0.00	\$673,518.55
Engineering	2	0	0	2	\$4,442,721.67	\$0.00	\$0.00	\$4,442,721.67
Geotechnical	1	0	0	1	\$706,430.93	\$0.00	\$0.00	\$706,430.93
Grand Total	51	8	20	79	\$67,224,729.50	\$327,391.60	\$17,371,166.17	\$84,923,287.27



**Tools for District/Division
Management of Contract
Status and Terminations**



- **Two Dashboard Tools for Managing Contracts:**
 - ***Contracts/Work Authorizations Terminating in 90 days (requires timely action)***
 - **Live Time Refresh**
 - **Demonstration using the following link:**
https://txdot4awdashp01/#/views/ContractWATerminatingin90Days_16228559487900/ContractsWAsTerminatingin90Days?:iid=1
 - ***“WA_SWA_SA Processing Days and Milestones”***
 - **Live Time Refresh**
 - **Demonstration using the following link:**
<https://txdot4awdashp01/#/views/WAProcessingDays/WAsInProcess?:iid=2>

Track Contract/WA Termination Dates



- Remember: Calendar Days!
- Run Date: 11/2/2022
- Long Form Dashboard
- Contract terminations within 90 calendar days in the Top View (can't filter by PM)
- Can set up an alert: Go to Watch Icon in Blue Banner

Contracts / WAs Terminating in 90 Days

Count of Contracts	Count of WAs
92	482

Contract SVC	Contract DD	Discipline	Contract Nbr	Firm Name	Fund Source	Contract Exec Dt	Contract Term DT	Contract Totl Amt	Count of WA	Contract Days Remaining
Dallas Service Center	18	ORG On/Off Replacement	366DP5385	[Redacted]	F	12/28/2016	12/28/2022	\$3,000,000	3	56
			366DP5400		F	1/4/2017	1/4/2023	\$3,000,000	4	63
			366DP5391		F	1/6/2017	1/6/2023	\$3,600,000	2	65
			366DP5389		F	1/14/2017	1/14/2023	\$3,000,000	4	73
		PS&E	367DP5076		S	1/30/2018	1/30/2023	\$5,500,000	1	89
			367DP5077		S	1/30/2018	1/30/2023	\$5,000,000	2	89
			367DP5137		S	1/31/2018	1/31/2023	\$5,740,636	1	90
			367DP5117		Utility Engineering	S	12/11/2017	1/30/2022	\$3,000,000	15

Track Contract/WA Termination Dates





- Scroll down to Bottom View to see at the Work Authorization level terminating in less than or equal to 90 days
- At this level you can filter by **WA DD** and **WA PM** (default is “All”) which means you would need to change
- Gradient graph indicates level of urgency

WA SVC				WA DD	WA Admin	WA PM	WA Status	WA Total Amt	WA Terminating		
(All)				(All)	(All)	(All)	Multiple values	(All)	In 90 days		
WA SVC	WA DD	Contract Nbr	WA Nbr	Firm Name	Contract Exec Dt	Contract Term DT	Wa Term Dt	WA Admin	WA PM	WA Totl Amt	WA Days Remaining
Austin Service Center	14	360 DP1001	2	[Redacted]	2/17/2020	2/17/2025	11/30/2022	Charles K Davidson	Gina Loftis-Franklin	\$441,752	28
		360 DP1009	4		1/31/2020	1/31/2025	11/30/2022	Charles K Davidson	Gina Loftis-Franklin	\$800,001	28
		366 DP5198	6		1/13/2016	11/30/2022	11/30/2022	Charles K Davidson	Kimberly Culp	\$992,775	28
		367 DP5115	2		12/11/2017	12/11/2023	11/30/2022	Charles K Davidson	Adrian Martinez	\$415,231	28
		367 DP5120	7		12/12/2017	12/12/2023	11/30/2022	Charles K Davidson	Solomon Bekele	\$833,015	28
			1		12/12/2017	12/12/2023	11/30/2022	Charles K Davidson	Anthony A Alrobaire	\$665,779	28
			3		12/12/2017	12/12/2023	11/30/2022	Charles K Davidson	Solomon Bekele	\$264,997	28

Track Contract/WA Termination Dates



- This step is if you wish to download into an Excel format to apply **multiple filters** other than what the database shows in its blue headings
- Export to Excel by clicking on  in the Blue Banner yields a dropdown
- Click on Crosstab, Select the sheet called **“Contract Terminating”**
- Confirm Format specifies **Excel** and click on 
- Recommended Format: **Crosstab** (Note: Excel filtering will require reformatting of the data)

Contract SVC	Contract DD	Discipline	Contract Nbr	Firm Name	Fund Source	Contract Exec Dt	Contract Term DT	Cntrct Totl Amt	Count of WA	
Dallas Service Center	18	BRG On/Off Replacement	366IDP5385		F	12/28/2016	12/28/2022	\$3,000,000	3	
			366IDP5400		F	1/4/2017	1/4/2023	\$3,000,000	4	63
			366IDP5391		F	1/6/2017	1/6/2023	\$3,600,000	2	65
			366IDP5389		F	1/14/2017	1/14/2023	\$3,000,000	4	73
		PS&E	367IDP5076		S	1/30/2018	1/30/2023	\$5,500,000	1	89
			367IDP5077		S	1/30/2018	1/30/2023	\$5,000,000	2	89
			367IDP5137		S	1/31/2018	1/31/2023	\$5,740,636	1	90
		Utility Engineering	367IDP5117		S	12/11/2017	11/30/2022	\$3,000,000	15	

What is the Status of My Document?



- Dashboard called: “WAs In Process” but expanded to include *WA_SWA_SA Processing Days and Milestones*
- Excellent tool to assist Districts and Divisions to ascertain status of Contracts/WAs in their portfolio (Live time)
- *Click on the following link:*
 - <https://txdot4awdashp01/#/views/WAProcessingDays/WAsInProgress?:iid=1>
 - Establishes filter for WA placeholders by Service Center, DD, Discipline, contract type and milestone status
 - Indicates the working days from when the *Identification of Contract Need* form is submitted to the Service Center for assignment
 - Don't forget to print out the *User Guidance* for ready reference

What Is the Status of My Document?



Filter by Service Center and Discipline. Top View @ Contract Level. Scrolling down to the bottom view titled **WA Milestones**

PEPS Collapsible **WAs In Process**

Count of WA: 5 Total Amount: \$21,032,250

User Guidance ⓘ

WA Service Center: Austin Service Center
 WA DD: AUS - 14
 WA over 50 days: (All)
 Contract+WA: (All)
 Contract Discipline: PS&E
 Contract Type: (All)
 Recent Milestone: YES

WA Service Center	WA DD	Contract+WA	Firm Name	Contract Discipline	Last Day To Issue Work	Cntrct Totl Amt	WA Totl Amt	WA Rqsted By	WA PM	Days from Request
Austin Service Center	AUS - 14	369IDP5098 - 1		PS&E	5/19/2024	\$10,000,000	\$10,000,000	Thomas J Krawitz	Thomas J Krawitz	111
		369IDP5085 - 4		PS&E	6/11/2024	\$10,000,000	\$2,732,250	Joseph A Muck	Joseph A Muck	102
		369IDP5093 - 4		PS&E	6/24/2024	\$10,000,000	\$7,000,000	Thomas J Krawitz	Kimberly Culp	100
		158IDP5014 - 3		PS&E	2/27/2023	\$5,000,000	\$1,000,000	Justin Goolsby	Justin Goolsby	30
		189IDP5015 - 2		PS&E	1/16/2024	\$5,000,000	\$300,000	Terry Newton	Terry Newton	2

0 50 100
Days from Request

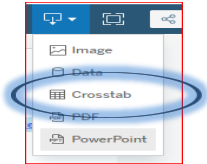
WA Milestones ⓘ

Contract+WA	WA Request DT	Milestone	Cycle	Milestone Updated	Milestone Status	Updated By	WA TxDOT PM	Comment
158IDP5014 - 3	8/16/2022	Correct Docs Received	2	9/27/2022	Waiting for DDO	Lisa Beilke	Justin Goolsby	Awaiting Routing Memo a...
189IDP5015 - 2	9/26/2022	Assignment	1	9/26/2022	Completed	Todd M Speck	Terry Newton	Null
369IDP5085 - 4	5/3/2022	Correct Docs Received	5	9/26/2022	Waiting for DDO	Lisa Beilke	Joseph A Muck	Awaiting corrected Exhibi...
369IDP5093 - 4	5/5/2022	Correct Docs Received	1	9/23/2022	Pending	Marialyce Luckey	Kimberly Culp	Received documents, sent...
369IDP5098 - 1	4/19/2022	Assignment	1	4/19/2022	Completed	Todd M Speck	Thomas J Krawitz	Null

What Is the Status of My Document?



- Convert into an **Excel** format to filter for **WA PM & track status** of the document
- Click on **“Crosstab”** to export into Excel. Must run twice.
- 1st time select **WA in Process** & 2nd time select **WA Milestones**



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1																Wa Proj Nm
2	Service Ce	WA DD	Contract+WA	Firm Name	Contract Discipline	Last Day To Issue Work	Contract Totl Amt	WA Totl Amt	WA Rqsted By	WA PM	Wa Cmmt	FM-2720	SH 71, SH 2	SH-21	SS 26	Various
3	Austin Ser	AUS - 14	369IDP509		PS&E	6/19/2024	\$10,000,000	\$10,000,000	Thomas J Krawitz	Thomas J Krawitz	Will need to check if CSJ's in PS when			111		
4			369IDP508		PS&E	6/11/2024	\$10,000,000	\$2,732,250	Joseph A Muck	Joseph A Muck	Specified Rate			102		
5			369IDP509		PS&E	6/24/2024	\$10,000,000	\$7,000,000	Thomas J Krawitz	Kimberly Culp	Will need to			100		
6			158IDP501		PS&E	2/27/2023	\$5,000,000	\$1,000,000	Justin Goolsby	Justin Goolsby	Lump Sum & Specified Rate.					30
7			189IDP501		PS&E	1/16/2024	\$5,000,000	\$300,000	Terry Newton	Terry Newton						2

- Click on triangle in upper left (turns green) Double click edge of one of the columns

	A	B	C	D	E	F	G	H	I	J	
1											
2	WA Service Center	WA DD	Contract+WA	Firm Name	Contract Discipline	Last Day To Issue Work	Contract Totl Amt	WA Totl Amt	WA Rqsted By	WA PM	
3	Austin Service Center	AUS - 14	369IDP5098 - 1		PS&E	6/19/2024	\$10,000,000	\$10,000,000	Thomas J Krawitz	Thomas J Krawitz	Will need to check if CSJ's in PS when documents submit
4			369IDP5085 - 4		PS&E	6/11/2024	\$10,000,000	\$2,732,250	Joseph A Muck	Joseph A Muck	Specified Rate
5			369IDP5093 - 4		PS&E	6/24/2024	\$10,000,000	\$7,000,000	Thomas J Krawitz	Kimberly Culp	Will need to check if CSJ's in PS when documents submit
6			158IDP5014 - 3		PS&E	2/27/2023	\$5,000,000	\$1,000,000	Justin Goolsby	Justin Goolsby	Lump Sum & Specified Rate.
7			189IDP5015 - 2		PS&E	1/16/2024	\$5,000,000	\$300,000	Terry Newton	Terry Newton	

What Is the Status of My Document?



WA in Process in Excel format: *Can't apply filters to merged cells!*

WA Service Center	WA DD	Contract+WA	Firm Name	Contract Discipline	Last Day To Issue Work	Cntrct Totl Amt	WA Totl Amt	WA Rqsted By	WA PM	Wa Cmnt	FM-2720
Austin Service Center	AUS - 14	369IDP5098 - 1		PS&E	6/19/2024	\$10,000,000	\$10,000,000	Thomas J Krawitz	Thomas J Krawitz	Will need to check if CSJ's in PS when documents submitted - ML	
		369IDP5085 - 4		PS&E	6/11/2024	\$10,000,000	\$2,732,250	Joseph A Muck	Joseph A Muck	Specified Rate	
		369IDP5093 - 4		PS&E	6/24/2024	\$10,000,000	\$7,000,000	Thomas J Krawitz	Kimberly Culp	Will need to check if CSJ's in PS when documents submitted - ML	100
		158IDP5014 - 3		PS&E	2/27/2023	\$5,000,000	\$1,000,000	Justin Goolsby	Justin Goolsby	Lump Sum & Specified Rate.	
		189IDP5015 - 2		PS&E	1/16/2024	\$5,000,000	\$300,000	Terry Newton	Terry Newton		

Process to unmerge and reformat to apply filters in Excel:

Click **Home**> **Merge & Center**> **Unmerge Cells**

Home> **Find & Select**> **Go To Special** dialog box, select **Blanks** option & click okay

Then **Press =** and then **Up** arrow key on the keyboard

Press **Ctrl + Enter** keys, all blank cells will fill with original merged data

Go to **Data** and click on **Filter**

WA Service Center	WA DD	Contract+WA	Firm Name	Contract Discipline	Last Day To Issue Work	Cntrct Totl Amt	WA Totl Amt	WA Rqsted By	WA PM	Wa Cmnt
Austin Service Center	AUS - 14	369IDP5098 - 1		PS&E	6/19/2024	\$10,000,000	\$10,000,000	Thomas J Krawitz	Thomas J Krawitz	Will need to check if CSJ's in PS when documents subm
Austin Service Center	AUS - 14	369IDP5085 - 4		PS&E	6/11/2024	\$10,000,000	\$2,732,250	Joseph A Muck	Joseph A Muck	Specified Rate
Austin Service Center	AUS - 14	369IDP5093 - 4		PS&E	6/24/2024	\$10,000,000	\$7,000,000	Thomas J Krawitz	Kimberly Culp	Will need to check if CSJ's in PS when documents subm
Austin Service Center	AUS - 14	158IDP5014 - 3		PS&E	2/27/2023	\$5,000,000	\$1,000,000	Justin Goolsby	Justin Goolsby	Lump Sum & Specified Rate.
Austin Service Center	AUS - 14	189IDP5015 - 2		PS&E	1/16/2024	\$5,000,000	\$300,000	Terry Newton	Terry Newton	

What Is the Status of My Document?



- Click on the Supplemental WA tab in dashboard (under the Blue Banner)

PEPS Supplemental Work Authorization Milestones

Count of SWA: 142

WA Service Center: (All) Contract+WA+SWA: (All) In Process: Yes Recent Milestone: Yes

[WA/SWA Tracking](#)

WA Service Center	Contract+WA+SWA	SWA Purpose	Firm Name	WA Term DT	SWA Create DT	Milestone	Cycle	Milestone Updated	Milestone Status	Updated By	WA Tx:DOT PM	Comment			
Austin Service Center	149IDP5007-4-1	Time only - terminate early.		5/2/2024	9/16/2022	Supplemental Requested	1	9/16/2022	Completed	Todd M Speck	Robert G Guydosh	Null	4		
	366IDP5413-1-4	time only ext		10/29/2022	8/4/2022	Supplemental Requested	1	8/4/2022	Completed	Todd M Speck	Jason H Hudson	Null	34		
	367IDP5011-1-4	budget scope time		3/23/2023	8/25/2022	PEPS Review Complete	4	9/15/2022	Waiting for DDO	Lisa Beilke	Kimberly Culp	Docs received..	9		
	367IDP5115-1-3	time ext		11/30/2022	9/21/2022	Supplemental Requested	1	9/21/2022	Completed	Harry C Pan	Lucas J Short	Null	1		
	368IDP5007-1-3	scope and budget		4/18/2023	9/1/2022	PEPS Review Complete	1	9/20/2022	Pending	Marialyce Luckey	Lucas J Short	Received documen..	4		

- Click on the Supplemental Agreement tab in dashboard (under Blue banner)

PEPS Supplemental Agreement Milestones

Count of SA: 34

Service Center: (All) Contract+SA: (All) In Process: Yes Recent Milestone: YES

[ITD Contract Review Tracker](#)

Service Center	Contract+SA	SA Purpose	Firm Name	Cntrct Term DT	SA Create DT	Milestone	Cycle	Milestone Updated	Milestone Status	Updated By	Comment			
Austin Service Center	368IDP5014-8	time only		4/26/2023	9/13/2022	Supplemental Requested	1	9/13/2022	Completed	Todd M Speck	Null	7		
	32314P5036-8	time and budget to contract		11/30/2022	8/5/2022	PEPS Review Complete	5	9/22/2022	Completed	Lisa Beilke	Docs sent to CSD for review.	3		





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