

AACE
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RECOMMENDED
PRACTICE

23R-02

IDENTIFICATION OF ACTIVITIES

SAMPLE

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AAACE® International Recommended Practice No. 23R-02

IDENTIFICATION OF ACTIVITIES
TCM Framework: 7.2 – Schedule Planning and Development

Rev. May 3, 2007

Note: As AAACE International Recommended Practice evolves over time, please refer to www.aacei.org for the latest revisions.

Contributors:

Disclaimer: The opinions expressed by the authors and contributors to this recommended practice are their own and do not necessarily reflect those of their employers, unless otherwise stated.

(May 3, 2007 Revision)

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(March 26, 2004 Revision)

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IDENTIFICATION OF ACTIVITIES

TCM Framework: 7.2 – Schedule of Planning and Development



May 3, 2007

PURPOSE

This recommended practice for identification of activities is intended to provide a guideline, not establish a standard. This guideline covers a key step in the schedule planning process of the total cost management (TCM) schedule planning and development process^[1].

This recommended practice is for use by the project team members involved in the schedule planning process for any project type and in any industry. Many individuals contribute in the identification of activities, and having an experienced planner coordinate the process improves final quality and adds value to the planning process.

As a recommended practice of AAACE International, identification of activities in schedule planning and development provides guidelines for the conversion of scope definition to specific activities and tasks required to complete a program or project. Identification of activities is a key planning step that takes place early in the schedule planning and development process which also includes estimating durations, determining and defining resources, and identifying external project constraints.

The scope definition of a program or project is generally described in various planning and technical documents, databases, or other deliverables. To begin the planning process, information in the scope documents must first be translated into manageable activities. For example, the scope may include the installation of a length of pipeline. Installing that pipeline may require designing, procuring, cutting, welding, erecting, and inspection activities. This process of expanding the high level scope or functional definition into the detailed work required for completion is the practice of “identification of activities”.

RECOMMENDED PRACTICE

The recommended practice for the identification of activities and schedule planning in general is to involve all the key team members under the leadership of the project manager with support from the planner/scheduler. For example, on a construction project, key team members might include the construction manager, engineering manager, quality assurance manager, safety representative, estimator, procurement representative and of course the planner/scheduler. For contractor schedules, an owner representative should attend the planning sessions when appropriate. Likewise, appropriate government agency representatives, key vendors and equipment suppliers, should participate as needed.

A team meeting and/or workshop are excellent forums to identify activities for the project schedule. Prior to the meeting, all scope documents and other supporting documents should be provided to the participants for review. Scope documents and supporting information may include the following:

- Statement of work
- Functional requirements
- Project concept documentation (including all appropriate contract drawings and technical specifications)
- Work breakdown structure (WBS)
- Significant project milestones and constraints
- Project estimate (including preliminary schedule of values)
- Risk analysis information including appropriate regulatory considerations that may affect the schedule
- Project procurement/contracting plan (long lead items)
- Lessons learned from previously completed similar projects