



**AACE**  
INTERNATIONAL  
RECOMMENDED  
PRACTICE  
26R-21

# DEVELOPING OR REVISING A SCHEDULING SPECIFICATION

**SAMPLE**

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AACE® International Recommended Practice No. 26R-21

## DEVELOPING OR REVISING A SCHEDULING SPECIFICATION

TCM Framework: 7.2. Schedule Planning and Development

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Any terms found in AACE Recommended Practice 10R-90, *Cost Engineering Terminology*, supersede terms defined in other AACE work products, including but not limited to, other recommended practices, the *Total Cost Management Framework*, and *Skills & Knowledge of Cost Engineering*.

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## 1. INTRODUCTION AND EXECUTIVE SUMMARY

This AACE International recommended practice (RP) defines a generic approach to the development of a scheduling specification. The purpose of this RP is to describe the basic structure and provide the minimum topics and associated requirements that should be addressed when preparing a schedule specification –without getting into specific details. This RP was developed to be used as a guide when developing or revising scheduling specifications. It also provides example language for specific topics that should be addressed in any specification. Additional details on the topics and requirements listed in this document are covered in the referenced RPs. This RP does not focus on a particular scheduling methodology; however, certain scheduling methodologies may necessitate specific and/or different requirements.

This RP has been benchmarked against numerous schedule specifications and references from varying industry sectors to confirm the relevance of the listed topics and requirements (see Exhibit 1). This analysis shows that the following are the minimum topics that should be addressed when preparing a schedule specification.

- Schedule Purpose
- Scheduling Methods
- Schedule Types and General Guidelines
- Specific Schedule Guidelines
- Schedule Development and Management
- Schedule Change Management
- Scheduling Coordination
- Scheduling Monitoring and Reporting

Additionally, AACE RP's and references have been identified and referenced to further discuss and provide additional detail for each of the topics listed above.

This document is not intended to be a standard. It is intended to provide guidelines for owners, contractors, designers, firms, companies, or any organization that has to utilize a schedule to manage projects. The readers should be aware that this RP can be used at any point during the project's lifecycle. However, it is recommended that this be used during the planning phase of a project to develop the scheduling specification or revise an existing specification. The topics addressed in this RP are general requirements that should be included regardless of the project delivery method. The guidelines set forth in this generic RP are those that most practitioners would consider to be best practices that can be relied on and that they would recommend be considered for use where applicable.

The purpose of a scheduling specification is to help enforce the requirements of the schedule. As such, a scheduling specification should be detailed enough, and at a minimum, address topics included in this RP to accurately enforce the requirements of the schedule. Please note that while there are many important aspects which can be addressed in a scheduling specification, care should be used to avoid an unduly overburdened specification requirement. Commensurate with the size and complexity of the project, flexibility to waive select requirements can be made at the owner/contracting level with the appropriate decision-making authority.

## 2. SCHEDULE PURPOSE

A scheduling specification should address schedule purpose to ensure that the intent of the schedule is clearly communicated to the project team(s). This section of the specification provides project stakeholders the insights to establish expectations related to the use of the project schedule. This section may also provide guidelines on the preferred software to be used.

The following is an example of how the US Army Corps of Engineers (USACE) modeled this requirement in their scheduling specification [1]:

*"Use:*

- *The Project Schedule, being a management control tool, may be applied to many aspects of work by the USACE. Project Schedules can be utilized by management for in-house analysis such as engineering and design, and life cycle project management. An example is in forecasting annual office budgets by analyzing projected placement from early finish and late finish sorts if costs have been assigned to those activities. In the planning phase, schedule analysis can be used to set construction durations prior to advertisement or it may be used in running scenarios for acquisition selection, i.e. design build (D-B) vs design bid build (D-B-B).*
- *Construction schedules, after contract award, must be contractor prepared and involve the subcontractors and suppliers in the actual planning. The Project Schedule should be of sufficient detail to allow both construction planning and management by the contractor and contract administration by the Government. Updating of actual progress should be performed by the contractor with Government concurrence as the update will project early or late contract completion and progress payment due.*
- *Changes to the work and occurrences which impact progress must be considered in the schedule to keep the schedule up to date and to reflect actual job progress. Determination can be made of where the contractor must accelerate to regain the schedule when behind due to its own actions. If applicable a determination of the impact and effect of Government actions on the contractor can be made in order to provide equitable adjustments to the contract time as required. The Contractor and Government should review potential delays and determine the most appropriate method for capturing the impact."*

Specifications and references [2] [3] [4] [1] refer to and address the topic of schedule purpose in their own detail and can be used as examples (see Exhibit 1).

### 3. SCHEDULE TERMINOLOGY

A scheduling specification should address the topic of schedule terminology, such as explaining and defining terms, abbreviations, notations, codes, etc. that are used. Defining the schedule terminology will help the project teams understand the information included in the schedule specification and accurately communicate the information to be included in the schedule submissions. It is recommended that RP 10S-90: *Cost Engineering Terminology* [5] be used for developing or revising a scheduling specification.

### 4. SCHEDULING METHODS

#### 4.1. Schedule Development Methodology

A scheduling specification should address the topic of scheduling methodology. The scheduling specification should also describe the method(s) for calculation and analysis of the project schedule, including any applicable software settings. Identification of the scheduling method helps the project teams obtain the correct resources to develop, maintain, and review the schedule. Clearly defined scheduling expectations set the foundation for consistency and transparency to help minimize time-related disputes.

The following is an example from the USACE's scheduling specification [1]:

*"Bar charts can be used to manage simple projects. On complex construction projects or other projects with many interrelated activities, a Critical Path Method (CPM) project schedule is recommended. CPM is a tool for analyzing progress, projecting completion, and calculating payment commensurate with actual progress. CPM must be carefully reviewed and updated regularly to be effective. The Chief of Construction is responsible for determination the appropriate project scheduling method..."*

Specifications and references [2] [3] [4] [1] refer to and address the topic of schedule purpose in their own detail and can be used as examples (see Exhibit 1).

#### **4.2. Schedule Analysis Methodology**

A scheduling specification should address the topic of schedule analysis methodology. Identification of the analysis method helps all stakeholders obtain the correct resources to prepare and analyze the schedule. This also ensures proper scheduling techniques are utilized when reviewing different types of schedules and can help provide guidance for analyzing time-related issues.

The following is an example from the New York State Department of Transportation (NYSDOT) scheduling specification [2]:

*"Events, actions, and progress that cause delays or gains to the Progress Schedule will be analyzed solely by the "Contemporaneous Period Analysis" method."*

Specifications and references [2] [6] address the topic of scheduling review methodology in their own detail and can be used as examples (see Exhibit 1).

### **5. SCHEDULE TYPES AND GENERAL GUIDELINES**

#### **5.1. Preliminary Schedules**

A scheduling specification should address the requirements of preliminary schedules to ensure that an initial schedule is used to help manage the project during the development and approval process for the full baseline schedule. The use of a preliminary schedule may also help resolve initial issues with the schedule prior to the development and submission of the full baseline schedule. Depending upon the duration of the project, a detailed schedule can be provided for a set duration, such as the initial 30 to 90 days of the project, and the remaining schedule be submitted at a semi-detail level to meet the contractual requirement. Similar to the full baseline schedule, the preliminary schedule should be submitted, reviewed, and approved. The preliminary schedule may also serve as a basis for progress payments until the baseline schedule is developed and approved.

A scheduling specification should also identify the length of review time by the owner for preliminary schedules. A review period of 7 calendar days is recommended, subject to complexity of the project. For the preliminary schedule, it is especially important to receive a timely response because this schedule covers an abbreviated project window. Lack of approval affects the scheduler's ability to report progress on the project. Stakeholders should understand that failure to meet both submission and review requirements will impact future submissions and the project team's ability to effectively manage the schedule.

The following is an example of language from the New Jersey Department of Transportation (NJDOT) scheduling specification [7]:

*"Submit the preliminary schedule and baseline schedule as follows:*