LINK21

CONNECT NORTHERN CALIFORNIA

STRATEGIC PROGRAM PLAN

CHAPTER 10: DELIVERY AND INTEGRATION

November 2022

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ISSUE AND REVISION RECORD

REVISION	DATE	PREPARER(S)	PMC REVIEWER(S) BART/CCJPA REVIEWER(S)	APPROVER BART/CCJPA APPROVER	DESCRIPTION/ NOTES
0	04/29/2021	Paul Padegimas, UNICO Engineering	Steve Lavelle, Intueor	Peter Gertler, HNTB	WPA.03 V2 Working DRAFT submittal
	05/13/2021	---	Sadie Graham, BART	Sadie Graham, BART	WPA.03 V2 Working DRAFT submittal review
1.A	06/04/2021	Paul Padegimas, UNICO Engineering	Steve Lavelle, Intueor	Peter Gertler, HNTB	WPA.03 V2 DRAFT submittal
	08/13/2021	---	Sadie Graham, BART	Sadie Graham, BART	WPA.03 V2 DRAFT submittal review
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2	04/07/2022	Paul Padegimas, UNICO Engineering	Steve Lavelle, Intueor	Peter Gertler, HNTB	WPA.04 DRAFT submittal
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3.A	09/23/2022	Catarina Brunckhorst, UNICO Engineering	Sudhish Verma, HNTB	Peter Gertler, HNTB	WPA.01 Working DRAFT submittal
	10/29/2022	---	Sadie Graham, BART	Sadie Graham, BART	WPA.01 Working DRAFT submittal review

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| REVISION | DATE | PREPARER(S) | PMC REVIEWER(S) | APPROVER | DESCRIPTION/ NOTES |
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SHAREPOINT PATH

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ACRONYMS AND ABBREVIATIONS

ACRONYM/ABBREVIATION	DEFINITION
BART	San Francisco Bay Area Rapid Transit District
CCJPA	Capitol Corridor Joint Powers Authority
I2MP	Integration and Interface Management Plan
IAN	Integration Actions and Needs
MPS	Master Program Schedule
PMC	Program Management Consultants
PMT	Program Management Team

LINK21 PROGRAM TEAM NAMES

TEAM NAME	TEAM MEMBERS
PMC	The HNTB Team
PMT	BART/CCJPA + PMC
Consultants	Consultants supporting program identification/project selection
Link21 Team	PMT + Consultants

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10. DELIVERY AND INTEGRATION

10.1. Purpose

The technical work for the Link21 Program (Link21) is divided into four service category delivery teams (service categories): Engagement and Outreach, Travel Demand and Land Use, Planning and Engineering, and Environmental. This technical work is being conducted by the Program Management Consultants (PMC) and the Consultants (Consultants) supporting program identification/project selection under the direction of the PMC delivery managers and the PMC program delivery manager.

The PMC works within the broader Program Management Team (PMT)[1] providing oversight, guidance, and technical direction. The work of these service categories feeds into the Business Case Framework, which guides Link21's decision-making. They have numerous points where they will interface, making them reliant upon each other for information and coordination to effectively progress Link21.

Link21 established an Integration Plan that identifies, manages, and documents interfaces between service category workstreams. It also provides proactive support of and coordination with the PMC delivery managers to make sure work progresses in an integrated and streamlined fashion.

The Integration Plan's primary objectives are to:

□ Facilitate effective communication between PMC and Consultant delivery managers and PMC leadership, as needed.

□ Systematically identify and document service category interfaces.

□ Proactively manage and track interfaces to verify each service category's information and coordination needs are being met.

10.2. Strategy

10.2.1. Organization

Delivery and Integration is led by the PMC program delivery manager whose responsibilities are to:

□ Deliver the program scope, schedule, and budget to expectation.

□ Lead and direct the service category teams.

□ Lead and direct the Integration Team.

□ Identify and resolve conflicts and challenges to scope, schedule, and budget.

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[1] San Francisco Bay Area Rapid Transit District (BART)/Capitol Corridor Joint Powers Authority (CCJPA) and PMC

◦ Coordinate with PMC leadership (operations, program management/controls, and strategic advising).

The PMC program delivery manager oversees and manages the integration and the interface management of the service category delivery teams. The Integration Team supports this work, and they assist and report directly to the PMC program delivery manager. The Integration Team's responsibilities are to:

◦ Manage, monitor, and report on program integration performance, change management, and conflict mitigations.

◦ Provide intermediate review and approval of integration deliverables.

◦ Coordinate and execute actions required to resolve interface issues and to identify related program and service category risks.

◦ Lead team integration meetings and approve of meeting outputs.

The PMC program delivery manager is supported by the respective PMC delivery managers and the Integration Team.

10.2.2. Process

The objectives identified in Section 10.1 will be achieved by the Integration Team through a set of processes, meetings, and deliverables identified in the *Integration and Interface Management Plan* (I2MP), which also provides specifics about the Link21 Integration Program. Key elements of the Integration Program include:

◦ **Effective Communication.** Conduct regular one-on-one and group meetings with the PMC delivery managers and other PMC and Consultant team members, as appropriate. Meeting agendas will be sent in advance of the meeting covering topics such as: Integration activities, updates and discussion, future interfaces, and other integration topics of concern.

◦ **Identification and Management of Interfaces**. Capture, track, and manage interfaces and interdependent activities through the use of consistent tools and processes, such as the Integrated Schedule, MPS, Potential Interfaces Lookahead (PIL), and Interface Control Documents (ICD).

◦ **Action Resolution**. Develop an Integration Actions/Needs (IAN) register to document, track, and resolve program interface issues and needs.

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10.3. Implementation

During Phase 0, the Integration Team made sure that items identified through PIL activities/deliverables were coordinated and IAN items were managed until resolved.

During Phase 1 and future phases, the necessity of an integrated schedule arose and the Integration Team, in collaboration with the Program Controls Team, has been leading coordination with all service categories to identify interfaces across all PMC and Consultant schedules.

As Link21 focuses on Stage Gate 2, the Integration Team will make sure that all interdependent activities are aligned in terms of schedule and scope. To achieve that, they will continue working, as described in the I2MP, to make sure Stage Gate 2 and future phase requirements and specifications are met and the program is able to continue advancing.

The following sections provide a brief overview of how the Integration Program's key elements (referenced in Section 10.2.2) are implemented in Phase 0 and 1, and future phases.

10.3.1. Effective Communication

The Integration Team facilitates effective communication among the four service categories. The work in each service category requires input from and coordination with the other service categories. Program integration confirms that the needs and actions associated with these interfaces are clearly communicated between the PMC delivery managers and the Consultant project managers. To achieve this, the Integration Team hosts meetings and provides tools to facilitate effective communication, as described in the following section.

Integration Meetings

The Integration Team holds bi-weekly meetings with each PMC delivery manager and their designated representatives and weekly group meetings with PMC delivery managers from all four service categories, the Equity Team, and others as appropriate per the meeting agenda. These meetings provide a forum to:

- Identify service category interfaces and reach concurrence on related needs, issues, and concerns.

- Discuss and reach concurrence on the actions necessary for responding to the needs, issues, and concerns.

- Provide updates on, resolution to, and closure of the needs and actions.

10.3.2. Identification and Management of Interfaces

As Link21 evolves, it requires a cohesive schedule that systematically links individual service category scope elements and schedule-related activities together in a single

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Primavera P6 Shared Environment to create an MPS. This approach significantly improves the ability to identify schedule opportunities and challenges, enabling a more informed dialogue around schedule interactions and interdependencies between the PMC and the Consultants, thereby improving program and project schedule functionality and management.

The Integration Team captures, tracks, and manages all service category technical interfaces through regular and detailed reviews of the MPS and respective points of interface and facilitated discussion during the aforementioned integration meetings. As Link21 progresses, the Integration Team hosts workshops, if and when appropriate, to evaluate the completeness and accuracy of captured interfaces by service category, and they will consolidate those interfaces into an interface register for tracking and management. The Integration Team holds regular reviews of all identified interfaces at integration meetings to add or update interfaces and to coordinate necessary actions, as appropriate.

10.3.3. Action Resolution

The Integration Team maintains an IAN Register to track, manage, and resolve each service category's needs and actions. These needs and actions are identified and entered into the IAN Register during integration meetings. Each entry includes information, such as the party requesting, party responsible, specific need and action, due date, and others, as appropriate. The Integration Team distributes IAN Register updates weekly to the PMC delivery managers and those responsible for actions related to issues in order to provide visibility into issues and to encourage action on them. Where appropriate, the Integration Team works with the risk management and the service category tasks to identify integration-related risks. Through this process, the Integration Team maintains an up-to-date status of all items. Progress/status is discussed during individual and group integration meetings. An action will only be considered resolved/closed when concurrence has been reached from the requesting and the performing party(ies).

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