

VA TEAM ROLES & RESPONSIBILITIES

VA uses multi-disciplinary teams with a range of perspectives to achieve meaningful results. Team Leaders are Certified Value Specialists (CVSs) recognized at the National level. Under the direction of a team leader, team members apply VA processes and techniques to the project being studied. Team member selection is the most vital part of the VA process. It is crucial that suitable team members are identified to maximize the performance of the study. The Team can be comprised of Caltrans, Local Agency, and/or Private Consultants experts not affiliated with the project, and must commit to participate for the duration of the VA Study.

CALTRANS DISTRICT VA COORDINATOR'S RESPONSIBILITIES

The District VA Coordinator's (DVAC's) function is to assure proper application of VA policies and procedures. The DVAC may assist in the selection of team members in cooperation with the appropriate project managers, stakeholders, and functional managers.

CALTRANS HQ VA COORDINATOR'S RESPONSIBILITIES

HQ maintains a VA Program oversight staff whose main function is to support the DVAC's efforts and the VA needs of the Department. HQ is required to report to FHWA an annual assessment of the VA program.

Caltrans Value Analysis Team

Caltrans' team of VA professionals are committed to promoting successful teams and are available to answer questions addressing your VA Study needs:

Statewide VA Program Manager:

Troy Tusup
(916) 653-3538

Statewide VA Administrator:

Richel Espinoza-Noss
(916) 653-4436

North Region DVAC:

Naghi Ghafari
(916) 274-6009

District 4 DVAC:

Hamid Khorram (DVAC)
(510) 286-4995
Binh Dang (Asst. DVAC)
(510) 286-5873

Central Region DVAC:

Habib Sabzehzar
(559) 243-3450

District 7 DVAC:

Jamal El-Jamal (DVAC)
(213) 897-0479
Duke Nguyen (Asst. DVAC)
(213) 897-4195

District 8 DVAC:

Anthony Robinson (DVAC)
(909) 383-6036
Jason Ahlswede (Asst. DVAC)
(909) 383-6031

District 11 DVAC:

Chilli Cilch (DVAC)
(619) 688-4217

District 12 DVAC:

Berc Ikizan (DVAC)
(949) 724-2591

FHWA VA Contact:

Jeff Holm
(916) 498-5021

<http://pd.dot.ca.gov/design/spec/proj/value-analysis.asp>



Value Analysis

A Quick Reference Guide for Local Partners



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WHAT IS VALUE ANALYSIS?

Value Analysis (or Value Engineering) is a function-oriented, systematic team approach used to analyze and improve value in a project, product, or process. It is a powerful methodology for solving problems and reducing costs while improving performance and quality. “Value” can be summed up with the following equation:

$$\text{Value} = \frac{\text{Performance} + \text{Delivery}}{\text{Cost}}$$

VA – A POWERFUL PROJECT MANAGEMENT TOOL

Value Analysis (VA) methodology has proven to be an extremely effective tool for project managers. It offers the following advantages:

- Convenes a panel of **experts** to advise on the following elements:
 - ❑ **Containing cost**
 - ❑ **Improving quality**
 - ❑ **Building consensus with our transportation partners**
 - ❑ **Solving difficult and complex transportation problems**
- Provides a documented, objective, multi-disciplinary solution to complex projects
- Involves stakeholders, PDT members and District management to ensure proper implementation of value

AGENCY REQUIREMENTS

The Implementing Agency of the Project is responsible for the VA study. The Project sponsors are responsible for funding project related activities including VA. All aspects of the study must comply with Chapter 19 of the Project Dev. Proc. Manual (PDPM).

As good stewards to the State Highway System and the Department’s oversight duties, Caltrans can take an active role as Team Members. The Project EA will be charged for all staff time involvement.

The Federal legislation (SAFETEA-LU) requires a VA Study for:

- **Highway Construction Projects:** ALL Projects on the federal-aided system (NHS and Interstate) over \$25 million* in total cost (R/W, Construction, and Support) regardless of funding source prior to Construction.
 - **Bridge projects:** over \$20 million in total cost regardless of funding source.
- * Due to unforeseen circumstances, VA studies should be considered on projects priced over \$15 million.

PROJECT DELIVERY

The Agency can obtain the best value by performing VA Studies in the early stages of project development. Historical data has proven that VA, when applied properly, can accomplish remarkable results. Caltrans benchmark performance goals are:

- Return on Investment = 100:1
- Project Savings of 5%
- Implementation Rate of 50%

TYPICAL VA STUDY

Typical studies involve a team of 7 – 10 multi-discipline Subject Matter Experts (SMEs) and one CVS team leader. The studies are typically six working days over a two or three week period of time. Including Pre and Post study meetings, each study should be resourced approximately 500 hours in the project work plan. Typical total cost of the Study is less than \$100,000.

VA STUDY STEPS

Pre-Study Preparation (8 hrs):

- Initiate Study
- Organize Study
- Form Team *
- Prepare Data

Study Workshop (40 hrs):

- Inform Team
- Analyze Functions
- Create Ideas
- Evaluate Ideas
- Develop Alternatives
- Critique Alternatives
- Present Alternatives
- Assess Alternatives
- Resolve Alternatives
- Present Alternatives

Post- Study Activities (8 hrs):

- Approving Alternatives *
- Implementing Alternatives
- Publish Results
- Close out Study

* Critical VA stages