

AGILITY WORK PLAN MANUAL



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AGILITY WORK PLAN MANUAL

Purpose:

The purpose of the Agility Work Plan Manual is to provide a tool to field staff showing how to complete and maintain an Agility Work Plan and proper documentation, including eContractor Services Payrolls to support an audit. For a more in-depth understanding on the Agility program, how it works, who is responsible for various program-related activities, and the overall benefits, please refer to the [Maintenance Manual \(Pub 23\), Chapter 23 - Agility](#) section.

How to Use the Agility Work Plan Training Manual:

This manual is set up for use as an electronic document or to be printed and kept in a binder for reference. If used as an electronic document (PDF), all samples of forms, worksheets, and similar items have their accompanying instructions on the preceding page. If printed and placed into a binder, these samples will be on the right side of the binder and the accompanying instructions will be on the left side of the binder. This information is important to note when printing this manual and placing the pages in a binder.

Also, the exhibits referenced in this manual can be found by clicking the following link:

[Agility Coordinator Resources](#)

The exhibits found there include:

- Agility File Checklist
- Agility Work Plan (Form MS-2)
- Agility Project Costing Worksheet
- Agility Service Exchanges (list of 618 Assemblies)
- Bureau of Operations' Municipal Rate Schedules (Winter and Comprehensive)
- Municipality Codes, by County
- Partner Agility Services (PAS) Form (Form MS-8)
- PennDOT's Agility Services Form (PDAS) (Form MS-8A)
- End-User Procedures:
 - How to Create an Agility Performed (RP) Agility Notification
 - How to Create an Agility Received (RR) Agility Notification
 - How to Enter eContractor Services (CS) Payroll

Note: All Agility Manual exhibits and forms should be sourced from the Agility Coordinator Resources page located on the BOI Agility SharePoint site to ensure using the latest version (link located above).

PennDOT's partnership with AFSCME:

PennDOT enters into Agility work plans in cooperation with the American Federation of State, County and Municipal Employees (AFSCME). AFSCME has supported the Agility Program since its inception in 1996. However, it is important to remember to involve your local and district AFSCME representatives in the early development of each work plan. Postponing AFSCME's involvement in the work plan process may negatively affect PennDOT's relationship with the union and/or delay or stop the exchange of services. The Agility Program helps to strengthen and build relationships and should be used in that spirit.

AGILITY WORK PLAN FILE AND FILE CHECKLIST

The Agility File Checklist is a tool to use when completing an Agility work plan. Following the Agility File Checklist will help ensure that an Agility work plan has been properly completed and all supporting documents are in the Agility work plan files kept in each PennDOT county maintenance office. Many of the items shown on the Agility File Checklist will be discussed in later sections of this manual.

For each Agility Work Plan, the accompanying Agility Work Plan File kept in the county office should include, but is not limited to:

- a. A copy of the fully executed Agility Agreement under which the Work Plan is being created.
- b. The signed Work Plan (MS-2) document
- c. Supporting documents used to prepare the work plan. For example: Any Analysis for Office (AO) Expenditure Analysis Reports used to estimate the costs when developing the work plan. If an Agility Project Costing Worksheet or other tool(s) were used, they should be included in the file.
- d. Scope of work
- e. PennDOT completed [PennDOT's Agility Services \(PDAS\) \(MS-8A\)](#) forms and supporting documents
- f. Partner completed [Partner's Agility Services \(PAS\) \(MS-8\)](#) forms and supporting documents
- g. Any additional documentation (such as emails) showing acceptance of work done for PennDOT and/or the partner
- h. Communication Logs or other documents used to verify communication between PennDOT and the partner, such as confirming the start date of the project, scheduling work plan activities, etc.
- i. If the work plan was incomplete when an agreement expired or created because of an incomplete work plan, copies of documentation for the incomplete work plan
- j. Agility Program Quality Assurance worksheet, with documentation showing financial analysis of the Work Plan
- k. Copy of the request to your District Fiscal Officer or Bureau of Fiscal Management to close out the WBS Element. This request should be completed within one year from the close out of the work plan.
- l. Completed Agility File Checklist – when all work has been completed on the work plan, it is a good practice to review the Agility File Checklist to ensure all required documents are in the file.

Each Agility Work Plan file must be held in the county office until 14 years after the execution date of the Agility Agreement under which the Work Plan was created. This will allow sufficient time for audits and similar activities and complies with the current file retention plan for the Agility Program statewide.

Agility File Checklist

SAMPLE

Agility Agreement No. A25103

Expiration Date: 3/30/2028

Partner Name: Millcreek Township

- ☐ **Agility Agreement – fully executed**
- ☐ **Work plan fully executed and contains all required information**
 - ☐ **Partner Name**
 - ☐ **Work Plan Letter/Number**
 - ☐ **Agility Agreement Number and expiration date**
 - ☐ **Planned production units, unit of measure, and unit price for all services**
 - ☐ **Estimated date of completion**
 - ☐ **All signatures on work plan – PennDOT, partner, and AFSCME**
 - ☐ **Attach Scope of Work, if applicable**
- ☐ **WBS Element obtained from District Fiscal Office**
- ☐ **Supporting documents on file**
 - ☐ **AO reports, district/county costs, costing work sheets, etc.**
- ☐ **RP notification and Work Order created for all PennDOT work on work plan**
- ☐ **RR notification created for all partner work on work plan**
- ☐ **Documentation for PennDOT contacting partner when work is to begin**
- ☐ **Date PennDOT completed work for partner**
 - ☐ **PennDOT sent completed MS-8A forms to partner (copies in file)**
 - ☐ **Partner accepted completed work provided by PennDOT**
 - ☐ **Notification of acceptance included in file**
- ☐ **Documentation for Partner contacting PennDOT when work is to begin**
- ☐ **Date partner completed work for PennDOT**
 - ☐ **PennDOT received completed MS-8 forms from partner (copies in file)**
 - ☐ **PennDOT accepted completed work by partner**
 - ☐ **Notification of acceptance included in file**
- ☐ **PennDOT enters eContractor Services Payroll for partner work completed**
- ☐ **Financial analysis of work completed by PennDOT and the partner**
 - ☐ **Value of services exchanged by PennDOT, and partner are reasonably equal**
 - ☐ **Expenditure analysis documents in file**
- ☐ **Work Plan closed out with all supporting documents**
- ☐ **WBS Element closed out with District Fiscal Office**

INFORMATION CONTAINED ON THE AGILITY WORK PLAN

An Agility Work Plan specifically describes the nature of work that PennDOT and the partner will perform for each other under an executed agility agreement. An unlimited number of work plans may be developed and signed over the life of one agility agreement, with the number of work plans governed by the capacity of either party to perform the work within the life of the agility agreement.

An Agility Work Plan contains partner information, including the active agility agreement number, partner name, expiration date of the agreement or renewal letter, and the Work Breakdown Structure (WBS Element). The work plan also indicates the services that are being provided, planned production units, units of measure, the unit price of the agility service exchange, estimated and actual completion dates, and signature lines for PennDOT, AFSCME, the Partner, and the Partner's union representative (if any). AFSCME may require two of their representatives to sign the work plan and if so, they will need to work within the space available. All parties must sign the work plan before any work can begin.

The first text box of the Agility Work Plan includes the following information:

- 1) Agility Work Plan letter/number sequence of the work plan** – Several work plans can be included under one agility agreement as long as adequate capacity exists for performing the work. The first work plan developed with the partner during the life of an agility agreement begins with the number one or letter A. Additional work plans developed with a partner during the life of an agreement will be numbered two, three four or lettered B, C, D etc.
- 2) Agility Agreement number** – when an agility agreement has been initiated, an agility agreement number is assigned by either the County Agility Coordinator (CAC) or the Agility Program Manager in Central Office. That number is unique to that agreement for that partner. If a partner's agility agreement expires and a new agreement is executed; a new agreement number must be assigned.
- 3) Partner Name** – the name that is listed for the partner on the agility agreement.
- 4) Agility Agreement Expiration Date** – is the date that the agility agreement expires. No work plan can be developed until an agility agreement has been fully executed. Agility agreements expire five years from the date the agreement was initially approved. Agility agreements also contain an option to renew the agreement for an additional three years. To do this, the renewal letter must be completed signed and returned no less than 60 days before the agreement expires in order for the three-year extension to be validated. For example: if an agreement will expire on March 30, 2025, the signed renewal letter is due in Central Office by January 30, 2025, and the new expiration date after the agreement renewal letter is validated would be March 30, 2028. When developing the work plan, please be sure to check the agility agreement expiration date, or the Renewal Letter expiration date, so that the services listed on the work plan are completed before the agility agreement expires. In the event a work plan is not completed within the time frame of the agility agreement, refer to page 28 for further instructions.
- 5) WBS Element - Instructions on how to establish the WBS Element** are on page 12.
- 6) County** – name of the PennDOT county that is developing the work plan

Agility Work Plan

SAMPLE

Agility Work Plan Number/Letter: <u> A (1) </u>	Agility Agreement #: <u> A25103 (2) </u>
Partner Name: <u> Millcreek Township (3) </u>	
Agility Agreement Expiration Date: <u> 3/30/2028 (4) </u>	
Agility Agreement Renewal Letter Expiration Date: <u> NA (4) </u>	
WBS Element: <u> T-A25103A9213-0120-618-2 (5) </u>	County: <u> Erie (6) </u>

Partner Completes

Services/Resources Received from the Partner	Planned Production Units	Unit	Unit Price	Total	Estimated Date of Completion	Completion Date Initials/Date Work Approved
Bridge Cleaning	6	Site	343.00	2,058.00	10/28/2026	(13)
(7)	(8)	(9)	(10)	(11)	(12)	
				0.00		
				0.00		
				0.00		
				0.00		
				0.00		
				0.00		
Totals				2,058.00		

PennDOT Completes

Services/Resources Provided by PennDOT	Planned Production Units	Unit	Unit Price	Total	Estimated Date of Completion	Completion Date Initials/Date Work Approved
Crack Sealing	2	LM	1,013.00	2,026.00	6/15/2024	(20)
(14)	(15)	(16)	(17)	(18)	(19)	
				0.00		
				0.00		
				0.00		
				0.00		
				0.00		
Totals				2,026.00		

Accepting:		
<u>Nick Miller</u> (21)	County Manager	7/11/2023
Signature, PennDOT	Title	Date
<u>Sam Cabot</u> (21)	Roadmaster	7/11/2023
Signature, Partner	Title	Date
<u>Josephine Williams</u> (21)	Union Representative	7/11/2023
Signature, AFSCME	Title	Date
<u>Anthony Webster</u> (21)	Union Representative	7/11/2023
Signature, Partner's Union	Title	Date
Use the reverse side of this Agility Work Plan to document the scope of work for the services listed above. If necessary to amend the Work Plan, all parties must sign off on changes.		

INFORMATION CONTAINED ON THE AGILITY WORK PLAN (CONT.)

The second text box includes the service(s) that PennDOT receives from the partner:

- 7) **Services/Resources Received from the partner** – the partner lists the service(s) that will be provided to PennDOT.
- 8) **Planned Production Units (of the service(s) to be provided from the partner)** – list the quantity of each service to be provided. For example: if the partner plans to clean 6 bridges over the life of the work plan, the quantity would be listed as “6.”
- 9) **Unit (of the service(s) to be provided)** – list the unit of measure for the service to be provided. For example: if the partner plans to clean bridges, the unit listed would be “sites.” The [Agility Service Exchanges](#) list can be provided to the partner and used to find the PennDOT unit for each service provided.
- 10) **Unit price** – a predetermined price for a single unit of work to be provided by the partner. The unit price includes the price charged for personnel, material, equipment and other associated services such as equipment rental, etc. for a single unit of work. For example: only the unit price for cleaning one bridge would be listed, even if the partner is providing bridge cleaning six times.
- 11) **Total (cost of the service(s) to be provided to PennDOT)** – the total cost is developed by multiplying the planned production units times the unit price for each service. For example: if the unit price to clean one bridge is \$343 and the partner is cleaning six bridges, the total cost would be $(6 \times \$343) = \$2,058$.
- 12) **Estimated Date of Completion** – is the anticipated date that the work will be completed. It is a good practice to expect our partner to complete their work for PennDOT within one or two work seasons from the date that PennDOT finishes providing its service to the partner. This increases accountability and lowers the risk of a partner defaulting on a work plan because of personnel turnover or changing conditions. However, in all situations, the partner must provide services to PennDOT on or before the expiration date of the agility agreement. This is a required and auditable field on the work plan.
- 13) **Initials Date/Work Approved** – PennDOT initials and dates the work plan to show that the work provided by the partner was acceptable. This is a required and auditable field on the work plan.



Agility Work Plan

SAMPLE

Agility Work Plan Number/Letter: <u>A (1)</u>	Agility Agreement #: <u>A25103 (2)</u>
Partner Name: <u>Millcreek Township (3)</u>	
Agility Agreement Expiration Date: <u>3/30/2028 (4)</u>	
Agility Agreement Renewal Letter Expiration Date: <u>NA (4)</u>	
WBS Element: <u>T-A25103A9213-0120-618-2 (5)</u>	County: <u>Erie (6)</u>

Partner Completes

Services/Resources Received from the Partner	Planned Production Units	Unit	Unit Price	Total	Estimated Date of Completion	Completion Date Initials/Date Work Approved
Bridge Cleaning	6	Site	343.00	2,058.00	10/28/2026	(13)
(7)	(8)	(9)	(10)	(11)	(12)	
				0.00		
				0.00		
				0.00		
				0.00		
				0.00		
				0.00		
Totals				2,058.00		

PennDOT Completes

Services/Resources Provided by PennDOT	Planned Production Units	Unit	Unit Price	Total	Estimated Date of Completion	Completion Date Initials/Date Work Approved
Crack Sealing	2	LM	1,013.00	2,026.00	6/15/2024	(20)
(14)	(15)	(16)	(17)	(18)	(19)	
				0.00		
				0.00		
				0.00		
				0.00		
				0.00		
				0.00		
Totals				2,026.00		

Accepting:

<u>Nick Miller</u> (21)	County Manager	7/11/2023
Signature, PennDOT	Title	Date
<u>Sam Cabot</u> (21)	Roadmaster	7/11/2023
Signature, Partner	Title	Date
<u>Josephine Williams</u> (21)	Union Representative	7/11/2023
Signature, AFSOME	Title	Date
<u>Anthony Webster</u> (21)	Union Representative	7/11/2023
Signature, Partner's Union	Title	Date

Use the reverse side of this Agility Work Plan to document the scope of work for the services listed above. If necessary to amend the Work Plan, all parties must sign off on changes.

INFORMATION CONTAINED ON THE AGILITY WORK PLAN (CONT.)

The third text box includes the service(s) that PennDOT performs for the Partner:

- 14) Services/Resources Provided by PennDOT** – PennDOT lists the service(s) that will be provided to the partner.
- 15) Planned Production Units (of the service(s) to be provided by PennDOT)** – list the quantity of each service to be provided. For example: if PennDOT plans to provide two lane miles of crack sealing to the partner, the planned production units listed would be “2”.
- 16) Unit (of the service(s) to be provided)** – list the unit of measure for each service to be provided. For example: if PennDOT plans to provide crack sealing, the unit listed would be “lane miles.” Use the correct units listed on the [Agility Service Exchanges](#) list. These units are compatible with the units listed in Plant Maintenance and must be used.
- 17) Unit price** – is a predetermined price for a single unit of work to be provided by PennDOT. The unit price includes the price to be charged for personnel, material, equipment and other associated services such as equipment rental, etc. for a single unit of work. More information on pricing PennDOT services for Agility work plans is provided in the “Determining PennDOT Costs in an Agility Work Plan” section below.
- 18) Total** – the total cost is developed by multiplying the planned production units times the unit price for each service. For example: if the unit price for crack sealing one lane mile is \$2,013 and PennDOT is providing two lane miles of crack sealing to the partner, the total cost would be $(2 \times \$2,013) = \$4,026$.
- 19) Estimated date of Completion** – is the anticipated date that the work will be provided by PennDOT. It is a good practice to expect our partner to complete their work for PennDOT within one or two work seasons from the date that PennDOT finishes providing its services to the partner. This increases accountability and lowers the risk of a partner defaulting on a work plan because of personnel turnover or changing conditions. Also, the estimated date should be considered when developing the costs for the service on the work plan. For example: if the service will be provided in the next calendar year, personnel, equipment and material rates, and other costs associated with performing the service could increase. However, in all situations, PennDOT must provide the service to the partner before the expiration date of the agility agreement. This is a required and auditable field.
- 20) Initials Date/Work Approved** – the partner initials and dates the work plan to show that the work provided by PennDOT was acceptable. This is a required and auditable field.

The fourth text box includes acceptance of the Agility Work Plan by all parties, which includes PennDOT, the Partner and AFSCME representative(s).

- 21) Acceptance** – Signatures indicate the work plan has been accepted and are required from PennDOT, the partner, and AFSCME representative(s). In some areas, AFSCME may require two representatives sign and the partner may require a union representative signature of their own. The fourth signature line is provided for these uses. All signature lines include the signatures of the representative accepting the work plan, their titles, and the dates the work plan was signed.

Agility Work Plan

SAMPLE

Agility Work Plan Number/Letter: <u>A (1)</u>	Agility Agreement #: <u>A25103 (2)</u>
Partner Name: <u>Millcreek Township (3)</u>	
Agility Agreement Expiration Date: <u>3/30/2028 (4)</u>	
Agility Agreement Renewal Letter Expiration Date: <u>NA (4)</u>	
WBS Element: <u>T-A25103A9213-0120-618-2 (5)</u>	County: <u>Erie (6)</u>

Partner Completes

Services/Resources Received from the Partner	Planned Production Units	Unit	Unit Price	Total	Estimated Date of Completion	Completion Date Initials/Date Work Approved
Bridge Cleaning	6	Site	343.00	2,058.00	10/28/2026	(13)
(7)	(8)	(9)	(10)	(11)	(12)	
				0.00		
				0.00		
				0.00		
				0.00		
				0.00		
				0.00		
Totals				2,058.00		

PennDOT Completes

Services/Resources Provided by PennDOT	Planned Production Units	Unit	Unit Price	Total	Estimated Date of Completion	Completion Date Initials/Date Work Approved
Crack Sealing	2	LM	1,013.00	2,026.00	6/15/2024	(20)
(14)	(15)	(16)	(17)	(18)	(19)	
				0.00		
				0.00		
				0.00		
				0.00		
				0.00		
				0.00		
Totals				2,026.00		

Accepting:		
<u>Nick Miller (21)</u> Signature, PennDOT	<u>County Manager</u> Title	<u>7/11/2023</u> Date
<u>Sam Cabot (21)</u> Signature, Partner	<u>Roadmaster</u> Title	<u>7/11/2023</u> Date
<u>Josephine Williams (21)</u> Signature, AFSCME	<u>Union Representative</u> Title	<u>7/11/2023</u> Date
<u>Anthony Webster (21)</u> Signature, Partner's Union	<u>Union Representative</u> Title	<u>7/11/2023</u> Date
Use the reverse side of this Agility Work Plan to document the scope of work for the services listed above. If necessary to amend the Work Plan, all parties must sign off on changes.		

DESCRIPTION OF THE AGILITY SERVICE EXCHANGE

It is a good practice to attach a Scope of Work to the Agility Work Plan to document specific information on the services to be provided by PennDOT and the partner.

The Scope of Work should include specific details such as:

1. A description of the services to be provided,
2. The estimated date (month, year) of when the service is to be completed,
3. The location of service,
4. The frequency of the service,
5. The materials used for the service,
6. Any special instructions relative to the service.

For example: if the partner is to provide the materials to PennDOT for the service; then the Scope of Work must reflect the materials and quantity of materials being provided. Also, PennDOT will give the partner a deadline by which the materials will be available for inspection by PennDOT and to ensure the materials are available **prior** to the start date of the service. All materials provided by a partner **must** meet PennDOT's specifications.

Services to be provided by Millcreek Township:

Millcreek Township will clean the Rt. 832/I-79 Bridge six times during the following seasons:

1. Spring of 2024 – to be completed no later than May 31, 2024,
2. Fall of 2024 – to be completed no later than October 31, 2024
3. Spring of 2025 – to be completed no later than May 30, 2025
4. Fall of 2025 – to be completed no later than October 31, 2025
5. Spring of 2026 – to be completed no later than May 29, 2026
6. Fall of 2026 – to be completed no later than October 30, 2026

Publications 213 and 408 will be adhered to by both the Partner and PennDOT.

Services to be provided by PennDOT:

PennDOT will crack seal two lane miles on Swanville Road beginning at the intersection of Georgian Court and ending at the intersection of Swanville Road and Tanager Drive by June 15, 2024. Millcreek Township will buy and deliver 750 lbs. of packaged crack seal material to PennDOT at the job site on Swanville Road. PennDOT will contact Millcreek Township two weeks prior to the date the work is to begin to ensure the materials are available and delivered timely to the job site. The materials purchased by Millcreek Township must meet PennDOT's specifications.

WORK BREAKDOWN STRUCTURE (WBS) ELEMENT

SAP WBS Elements are required for all Agility service exchanges provided by PennDOT, in order to process Highway payrolls. Most District Fiscal Offices have their own request form for WBS Elements, and your district's form should be used. When completing your district's form, use the following information to fill in the corresponding fields on the form.

The following steps are used when completing the WBS Element Form:

1. **PROJECT KEY (if requested) –**
Is the letter “T” which refers to a manual entry in SAP
2. **SYS -**
Is the letter “A”
3. **ROADWAY SYSTEM/WORK ORDER –**
Is the 5-digit Agility Agreement number assigned to that Agility partner (omit the letter “A” at the beginning of the agreement number)
4. **SUB-PROJECT/SPUR –**
Is the Agility Work Plan project number for that partner. For example: if this is the first Agility Work Plan developed for that partner, the Sub-Project is represented by the letter “A.” The second project is “B” and the third project is “C” and so on.
5. **PHASE –**
Is the number “9” which refers to work being completed by maintenance
6. **SECTION –**
Is the 3-digit municipality code or other 3-digit code designated for other partners such as volunteer fire departments, etc. An example of a 3-digit code for a non-traditional partner such as a fire department could be “VFD”, or if the partner is a state agency such as the Department of Corrections the 3-digit code could be “DOC”, and so forth. The code can be either alpha or numeric. A listing of municipal codes by county can be found here:

[Other Work Plan Resources](#) (see below for screenshot)
7. **ORG -**
Is the 4-digit PennDOT organization code. For example: Erie County is 0120
8. **PROGRAM –**
Is for program code for the Agility Program activities, which is 618.
9. **PART CODE (if requested) –**
Is the number “2” which refers to the project being funded 100% by state funds
10. In the Remarks, indicate the partner name and service exchange to be provided, and the location of the work (if not shown elsewhere on the form).

AGILITY SERVICE EXCHANGES LIST

The list of agility service exchanges identifies the assembly numbers and the unit of measure for all Agility program services. All Agility-related assemblies are found in program 618. It is important when developing a work plan to use the production units listed for these specific program-618 services. These assembly numbers and production units are also necessary when creating notifications in Plant Maintenance Highway and eContractor Services Payroll entries. The full list of potential Agility Service Exchanges can be found here:

[Other Work Plan Resources](#)

BOI ▸ **Workplan Resources** ▸ **Other Work Plan Resources**

 New

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✓	 Name		Modified	Modified By
	 Agility File Checklist	...	April 4	☐ Snyder, Robert (PENNDOT BOI)
	 Agility File Checklist	...	April 4	☐ Snyder, Robert (PENNDOT BOI)
	 Agility Program Quality Assurance Review Worksheet	...	May 9	☐ Snyder, Robert (PENNDOT BOI)
	 Agility Project Costing Work Sheet - 5_9_2024	...	May 9	☐ Snyder, Robert (PENNDOT BOI)
	 Agility Service Exchanges (618 Assemblies) List	...	April 4	☐ Snyder, Robert (PENNDOT BOI)
	 Municipality Codes(Agility)	...	March 21	☐ Snyder, Robert (PENNDOT BOI)

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DETERMINING PENNDOT COSTS IN AN AGILITY WORK PLAN

The projected costs to complete the agility service exchange are indicated on the work plan. Regardless of where cost data is found, PennDOT considers the following items as part of costing out an agility service exchange for its partner:

1. **Direct or hourly cost** – includes direct salaries, wages and overtime that will be incurred by the district and county staff providing the service as documented on the work plan.
2. **Equipment cost** – includes the cost to PennDOT to own, maintain and operate equipment or the cost to PennDOT to rent and operate the equipment.
3. **Material cost** – includes the cost of materials that are incidental to the services being provided by PennDOT to the partner. With some exceptions, PennDOT is prohibited from providing only materials to a partner as part of an agility service exchange. Refer to [Chapter 23 - Agility](#) in [Publication 23](#) for exceptions. In addition, PennDOT may be asked to only provide services as part of the Agility service exchange, with materials supplied by the partner. In this case, all materials provided by the partner **must** meet PennDOT's specifications. If the partner provides all materials for an activity on the work plan, then PennDOT cost of materials for that activity is zero.
4. **Other Costs** – include additional expenses that result from the local conditions in which the work is to be performed. For example: other costs to consider are the distance to the work site, nature of work (such as cutting overgrown areas instead of regularly maintained areas), differences in the age or condition of the equipment to be used, etc.

Your county Business Manager (or a manager or staff member with similar SAP roles) can run an **Expenditure Analysis Report** in Analysis for Office (AO) that will show your county's total cost and average cost per production unit for each Assembly to which activity has been billed in any Production Fiscal Year. The report also breaks these costs down into Personnel costs, Materials costs, Department Equipment costs, Rental Equipment costs, and Other (Misc.) costs, all of which meet the definitions above. When using the Expenditure Analysis Report to cost out PennDOT services for an Agility exchange, you should use data based on the non-Agility (programs 711, 712, 714, etc.) assembly corresponding to the activity you will be exchanging, NOT the Agility (program 618) assembly. Note that you may still need to add an "other costs" adjustment if the partner's worksite conditions, location, etc. are likely to cause additional costs PennDOT would not normally experience when working on the PennDOT-owned network.

When suitable Expenditure Analysis Report data is not available for the activity you wish to exchange, the **Agility Project Costing Worksheet** can be used as a tool to estimate costs associated with a work plan. Direct and hourly costs, equipment, material, and other costs can be entered into the Excel worksheet to provide a cost breakdown when completing a work plan. The worksheet provides much of the data needed, including hourly labor rates from pay scale charts and hourly equipment rates from the Department Equipment Rate Development System (DERDS). You may need to do additional research to find data such as material costs from recent purchasing data for your county or district, and similar items. The Agility Project Costing Worksheet can be found here:

[Other Work Plan Resources](#)

Sample Expenditure Analysis Report Page

Commonwealth of
Pennsylvania

Expenditure Analysis Report - Single County

Last Data Update: 11/19/2007 12:07 PM

Query Last Refreshed At: 03/24/2023 04:11 PM

Information

Query Created By: BHOFFMAN

Query Last Refreshed At: 03/24/2023 04:11 PM

Logged On User: P00699005

Key Date: 03/24/2023 12:00 AM

Query Last Changed By: P00504742

Query Last Changed At: 09/25/2022 09:37 AM

InfoProvider Technical Name: ZPM_M10

Last Data Update: 11/19/2007 12:07 PM

Query Technical Name: YZPM_M10_Q5018

Data Source Name: Expenditure Analysis Report - Single County

Assembly		[+] Total County 0120	Personnel Costs	Material Costs	Rented Equip Costs	Dept Equip Costs	Misc Costs	Actual Production County 0120	[+] Avg Cost per Prod Unit County 0120	Avg Pers Cost per Prod Unit	Avg Mat Cost per Prod Unit	Avg Rented Equip Cost per Prod Unit	Avg Dept Equip Cost per Prod Unit	Avg Misc Cost per Prod Unit	Avg Cost per Prod Unit District 01	Statewide Avg Cost per Prod Unit
701245999	701245999	\$ 19,613.82					\$ 19,613.82									
701921299	701921299	\$ 192.78	\$ 181.51				\$ 11.25									
701940199	701940199	\$ 47,867.71	\$ 46,786.27				\$ 1,081.44									
701940299	701940299	\$ 149,551.48	\$ 4,898.35			\$ 31.08	\$ 144,822.05									
701940399	701940399	\$ 198.68	\$ 198.68													
701940999	701940999	\$ 705.00	\$ 630.87				\$ 74.13									
701941399	701941399	\$ 8,974.55	\$ 8,974.55													
701941499	701941499	\$ 212.40	\$ 212.40													
701941599	701941599	\$ 2,638.33	\$ 1,737.05				\$ 801.28									
701998999	701998999	\$ 19,797.38					\$ 19,797.38									
711240199	711240199	\$ 17,796.30	\$ 2,365.90				\$ 15,430.40									
711240299	711240299	\$ 564.65	\$ 502.91			\$ 61.74										
711240799	711240799	\$ 5,210.18	\$ 4,533.62			\$ 352.56	\$ 324.00									
711711301	Roads-Unpaved Restabilization	\$ 3,609.94	\$ 2,560.60			\$ 1,049.34		200,000 YD2	\$ 18.05	\$ 12.80			\$ 5.25		\$ 18.05	\$ 2.72
711711401	Roads-Unpaved Dust Palliative	\$ 3,734.35	\$ 1,479.01	\$ 1,450.21		\$ 805.13		975,000 YD2	\$ 3.83	\$ 1.52	\$ 1.49		\$ 0.83		\$ 3.83	\$ 0.19
711712101	Roads-Paved Patch-Manual	\$ 206,574.12	\$ 146,403.08	\$ 14,702.71		\$ 45,468.33		182,770 TON	\$ 1,130.24	\$ 801.02	\$ 80.44		\$ 248.77		\$ 1,382.30	\$ 1,280.95
711712102	Roads-Paved Patch-Manual-Non Standard	\$ 4,137.68	\$ 2,070.91	\$ 142.45		\$ 1,924.82		2,000 TON	\$ 2,088.99	\$ 1,035.48	\$ 71.23		\$ 962.31		\$ 2,088.99	\$ 1,130.31
711712104	Roads-Paved Spray Patch Manual	\$ 187,158.39	\$ 112,437.87	\$ 28,288.30		\$ 46,452.22		288,460 TON	\$ 648.82	\$ 389.79	\$ 98.00		\$ 161.04		\$ 624.22	\$ 840.31
711712105	Roads-Paved Patch-Manual-Mech. Cutting	\$ 88,042.97	\$ 52,115.94	\$ 7,488.79		\$ 28,438.24		80,200 TON	\$ 1,097.79	\$ 649.82	\$ 93.38		\$ 354.59		\$ 684.80	\$ 696.44
711712199	711712199	\$ (2,944.17)		\$ (3,654.29)			\$ 1,010.12									
711712203	Roads-Paved Patch-Mech Finish Pave	\$ 473,377.09	\$ 128,678.17	\$ 247,326.23		\$ 97,372.66		2,771,550 TON	\$ 170.80	\$ 46.43	\$ 89.24		\$ 35.13		\$ 176.80	\$ 181.55
711712204	Roads-Paved Patch-Edge Only-Mech	\$ 172,889.59	\$ 53,647.11	\$ 92,327.65		\$ 26,914.80		1,120,800 TON	\$ 154.26	\$ 47.87	\$ 82.38		\$ 24.01		\$ 158.90	\$ 183.25
711712401	Roads-Paved Surf Treat Liq Bit	\$ 1,639,664.39	\$ 297,344.42	\$ 1,199,910.56		\$ 142,353.41	\$ 56.00	398,084,000 GAL	\$ 4.25	\$ 0.77	\$ 3.11		\$ 0.37	\$ 0.00	\$ 4.38	\$ 4.70
711712499	711712499	\$ (4,664.97)		\$ (4,664.97)												
711712604	Roads-Paved Base/Subbase Widener	\$ 146,643.69	\$ 41,758.97	\$ 86,282.11		\$ 18,802.58		988,050 TON	\$ 148.72	\$ 42.35	\$ 87.50		\$ 18.87		\$ 187.96	\$ 138.57
711712702	Roads-Paved Skin Patching	\$ 73,193.21	\$ 20,073.25	\$ 43,509.08		\$ 9,610.90		14,813,000 GAL	\$ 4.94	\$ 1.39	\$ 2.94		\$ 0.65		\$ 4.94	\$ 6.59
711712801	Roads-Paved Crack Seal Bit Surf	\$ 130,229.87	\$ 80,545.97	\$ 20,078.62		\$ 29,607.28		67,112 LM	\$ 1,940.49	\$ 1,200.17	\$ 299.15		\$ 441.18		\$ 1,259.92	\$ 1,823.66
711713201	Milling-Bit Surface	\$ 56,967.08	\$ 30,880.14			\$ 26,286.94		9,427,170 YD2	\$ 6.04	\$ 3.25			\$ 2.79		\$ 5.66	\$ 5.50
711713202	Spot Milling/Heat Scarifying-Bit Surf	\$ 1,128.19	\$ 768.19			\$ 358.00		50,000 YD2	\$ 22.52	\$ 15.39			\$ 7.16		\$ 11.72	\$ 23.20
711714101	Rds-Pvd Concrete Patching Full Depth	\$ 9,111.52	\$ 5,088.56	\$ 876.60		\$ 3,146.36		30,600 YD2	\$ 297.76	\$ 166.29	\$ 28.65		\$ 102.82		\$ 865.80	\$ 965.80
711714801	Roads-Paved Stockpile Aggregate	\$ 38,136.03	\$ 25,094.08			\$ 13,041.95		537,000 H	\$ 71.02	\$ 46.73			\$ 24.29		\$ 80.49	\$ 79.22
711715101	Roads-Paved Risk Mgt/Safety	\$ 25,215.87	\$ 18,532.77			\$ 6,683.10		2,000 STE	\$ 12,607.94	\$ 9,266.39			\$ 3,341.55		\$ 22,726.72	\$ 1,633.09
711721301	Shoulders-Unpaved Stabiliz. Mech	\$ 63,291.83	\$ 38,286.71			\$ 25,005.12		32,500 MI	\$ 1,947.44	\$ 1,178.05			\$ 789.39		\$ 2,751.21	\$ 5,753.59
711721401	Shoulders-Unpaved Dust Palliative	\$ 4,874.91	\$ 445.77	\$ 4,355.69		\$ 73.45		3,520,000 YD2	\$ 1.38	\$ 0.13	\$ 1.24		\$ 0.02		\$ 2.14	\$ 0.74
711721499	711721499	\$ (755.32)		\$ (755.32)												
711721501	Shoulders-Unpaved Cutting Belt Loader	\$ 98,778.80	\$ 80,815.58			\$ 37,963.24		91,300 MI	\$ 1,081.91	\$ 886.11			\$ 415.81		\$ 1,450.38	\$ 1,490.03
711721502	Shoulders-Unpaved Cutting Frt End Loader	\$ 7,304.20	\$ 4,745.47			\$ 2,558.73		1,100 MI	\$ 6,640.18	\$ 4,314.09			\$ 2,328.12		\$ 5,483.18	\$ 2,730.40
711721701	Shoulders-Unpaved Stabiliz. Manual	\$ 108,248.31	\$ 78,704.87	\$ 2,540.31		\$ 28,003.13		18,708,000 FT	\$ 5.79	\$ 4.28	\$ 0.14		\$ 1.39		\$ 4.11	\$ 3.75
711722401	Shoulders Paved Surf Treat Liq Bit	\$ 164,944.41	\$ 43,327.88	\$ 101,354.67		\$ 20,041.44	\$ 220.64	33,968,000 GAL	\$ 4.86	\$ 1.28	\$ 2.96		\$ 0.59	\$ 0.01	\$ 4.85	\$ 6.53
711722501	Shoulders Paved Driveway Adjust	\$ 3,628.70	\$ 2,563.32			\$ 1,265.38		106,000 FT	\$ 36.12	\$ 24.18			\$ 11.94		\$ 24.90	\$ 18.41
711722801	Shoulder Paved Crack Seal	\$ 19,380.33	\$ 12,858.72	\$ 2,104.70		\$ 4,416.91		36,412 LM	\$ 491.74	\$ 328.26	\$ 53.40		\$ 112.07		\$ 660.22	\$ 783.86
711731101	Drain Clean-Inlet Endwall	\$ 87,703.68	\$ 74,667.67			\$ 13,036.01		975,000 EA	\$ 89.95	\$ 76.58			\$ 13.37		\$ 95.84	\$ 84.31
711731102	Drain Clean-Inlet Endwall Clogged	\$ 43,355.80	\$ 25,709.65	\$ 509.42	\$ 5,425.00	\$ 11,711.73		51,000 EA	\$ 850.11	\$ 504.11	\$ 9.99	\$ 106.37	\$ 226.64		\$ 569.71	\$ 404.28
711731201	Drain Clean-Ditch/Drain Chan Mech	\$ 272,160.09	\$ 183,726.58	\$ 260.76		\$ 88,172.75		62,085,000 FT	\$ 4.38	\$ 2.96	\$ 0.00		\$ 1.42		\$ 2.11	\$ 3.07
711731203	Drain Clean-Swales	\$ 4,193.10	\$ 3,070.70			\$ 1,122.40		260,000 FT	\$ 16.13	\$ 11.81			\$ 4.32		\$ 5.62	\$ 5.70
711731401	Clean Pipes And Culverts	\$ 1,805.75	\$ 1,474.31			\$ 331.44		125,000 FT	\$ 14.45	\$ 11.79			\$ 2.65		\$ 19.36	\$ 9.45
711731501	Install Rock Lining	\$ 92,687.20	\$ 45,538.21	\$ 27,376.39		\$ 19,772.60		3,615,000 FT	\$ 25.64	\$ 12.60	\$ 7.57		\$ 5.47		\$ 15.07	\$ 19.33
711732101	Drainage-Rep/Replace Inlet &/or Endwall	\$ 294.58		\$ 294.58											\$ 2,259.81	\$ 2,072.28
711732102	Drain-Rep/Adjust Inlet &/or Endwall	\$ 13,350.12	\$ 10,621.71	\$ 180.12		\$ 2,548.29		6,000 EA	\$ 2,225.02	\$ 1,770.29	\$ 30.02		\$ 424.72		\$ 960.07	\$ 2,091.72
711732401	Repl Pipes & Culverts under 36"	\$ 129,221.09	\$ 48,728.35	\$ 43,498.50		\$ 37,024.24		806,000 FT	\$ 160.32	\$ 80.46	\$ 53.93		\$ 45.94		\$ 118.20	\$ 127.36
711732402	Repl Pipes & Culverts 36" & over	\$ 85,301.09	\$ 24,311.59	\$ 38,997.68		\$ 16,136.82	\$ 5,955.00	302,000 FT	\$ 282.45	\$ 90.50	\$ 128.80		\$ 53.43	\$ 19.72	\$ 274.27	\$ 523.19
711732403	Repl Pipes & Culverts Parallel	\$ 85,658.53	\$ 51,038.76	\$ 12,744.69		\$ 21,875.08		380,000 FT	\$ 225.42	\$ 134.31	\$ 33.54		\$ 57.57		\$ 208.51	\$ 113.89
711732404	Replace Pipes-Extensions only	\$ 4,435.75	\$ 2,962.43	\$ 374.61		\$ 1,098.71		12,000 FT	\$ 369.65	\$ 246.87	\$ 31.22		\$ 91.56		\$ 219.64	\$ 298.16

DETERMINING PENNDOT COSTS IN AN AGILITY WORK PLAN (CONT.)

If you are using cost information for the relevant Assembly or Assemblies taken from an appropriate AO Expenditure Analysis Report, most of the relevant cost factors described here should be accounted for in the data provided. However, you should still check to verify there are no exceptional costs associated with items 1, 4, 5, and 6 below.

If you need to work through the Agility Project Costing Worksheet to determine PennDOT costs for an Agility Work Plan, remember that all of the following must be considered:

1. **Where the service is to be provided** – visit the site where the service will be provided to adequately cost out the project. For example – if PennDOT is paving a local road; what is the current condition of the road; is prep work needed beyond the usual paving operation; can the crews with their equipment easily access the road to be paved, etc. ***NOTE: even if you are using AO reports for cost data, you should do a site visit so that you can adjust cost estimates for potential problems or special circumstances when needed.***
2. **What crew will be providing the service** – consider the skill level of the crew being used (e.g., a general maintenance crew versus a specialized crew assigned to performs the activity needed all season long); this could impact the hours needed to complete the service.
3. **What equipment will be used to provide the service** – consider the differences in the age, condition, and capacity of the equipment to be used when determining the hours necessary to complete the service.
4. **What materials will be used to provide the service** – with some exceptions (refer to [Pub 23, Chapter 23](#) for the exceptions), PennDOT is prohibited from providing only materials to a partner as part of an agility project. If materials are provided, the materials must be incidental to the service that PennDOT provides to the partner. Also, if a partner chooses to provide PennDOT with the materials needed to perform the service requested, remember that the materials provided must meet PennDOT specifications and partner-provided materials should NOT be counted in PennDOT's work plan cost.
5. **How much time will be required to complete the service** – consider the location of the project including the distance to/from the work site, the crews that will be used, the mobilization of equipment, prep work for the project, need for backhaul or similar activities, or a need for flaggers and/or extensive work zone set-up. Also, consider whether crews can perform the activity for the partner while working on that same activity elsewhere in the area or crews need to make specific arrangements to perform the activity for the partner.
6. **When the service will be provided** – consider the date by which the service must be completed. For example – if PennDOT is providing the service to the partner in a future fiscal year; it will be necessary to adjust the current unit costs to reflect increases in wage rates, employee benefits, operational costs for equipment, etc.

The cost to serve the partner is important for two reasons: First, the Motor License Fund cannot incur a deficit. This means a reasonably equal exchange of services must occur between the partner and PennDOT. Second, costs are a major component in determining whether the service exchange makes good business sense and should be considered at all.

Agility Project Costing Worksheet – Sample

A	B	C	D	E	F	G	H	I	J	K	L	M
1	Agility Spreadsheet for Costing Out a Work Plan											
2	Agility Agreement Number: A25103					Partner Name: Millcreek Township						
3	Work Plan Letter: A					Date: 7/10/2023						
4	PERSONNEL					MATERIALS:						
5	Employee Title	Quantity	Hours	Hr. Rate	Total	Type of Material	Unit	Unit Cost	Quantity	Total		
6	Foreman	1	7.5	\$ 26.59	\$199.43							
7	Hwy Maint Wkr	2	7.5	\$ 17.01	\$255.15							
8	Operator B	2	7.5	\$ 22.05	\$330.75							
9	Operator A	2	7.5	\$ 19.10	\$286.50							
10												
11												
12												
13												
14												
15												
16												
17	Total				\$1,071.83	Total						\$0.00
18												
19	EQUIPMENT:					OTHER COSTS:						
20	Type of Equipment:	Quantity	Hours	Hr. Rate	Total	Type	Unit	Unit Cost	Quantity	Total		
21	A13 CREW CAB	1	7.5	\$ 16.30	\$122.26							
22	A15 SINGLE AXLE DUMP	1	7.5	\$ 39.20	\$294.01							
23	C25 KETTLE	1	7.5	\$ 53.50	\$401.24							
24	C08 COMPRESSOR	1	7.5	\$ 18.35	\$137.65							
25												
26												
27												
28												
29						e.g. Meeting Space	Site	\$ 1,000.00	1.00	\$1,000.00		
30						Total						\$0.00
31												
32						PERSONNEL TOTAL	\$1,071.83					
33						EQUIPMENT TOTAL	\$955.16					
34						MATERIAL TOTAL	\$0.00					
35						OTHER COSTS TOTAL	\$0.00					
36						SUB TOTAL	\$2,026.98					
37												
38												
39	Total				\$955.16							

PARTNER COSTS IN AN AGILITY WORK PLAN

When working with a partner to develop an Agility Work Plan, discussion and/or negotiation with the partner to come to agreement on cost factors may be necessary. Some partners will be able to estimate costs for the services they provide in an Agility exchange independently and will have documentation of their calculations and sources for cost data if needed during negotiations. In this case, you should use available reference data to ensure partner estimates are reasonable during the negotiation process. Other partners may need assistance or look to PennDOT to suggest sources for this cost data. In this case, you can use some of these same reference data to develop cost estimates for partner services and use these estimates to make a business offer to the partner during negotiations.

Regardless of the situation, it is NOT PennDOT's role to dictate either the sources or methods used by partners to develop their cost estimates, but PennDOT reserves the right to accept or reject any or all business offers from a partner during negotiations.

There are two sources to consider when developing your own estimates of partner costs in order to make a business offer to a partner or when you wish to check the reasonableness of partner cost estimates while negotiating an Agility Work Plan:

- The Winter Rate Schedule ("Attachment A") lists the rates at which PennDOT compensates municipalities for services under Winter Service Agreements. All rates are shown per snow lane mile by county and roadway Maintenance Function Code (MFC).
- The Comprehensive Maintenance Agreements Rate Schedule ("Attachment B") lists the rates at which PennDOT compensates municipalities for 36 common maintenance services under Comprehensive Maintenance Agreements.

The Bureau of Operations updates and publishes these rate schedules annually and they are available on PennDOT's shared P-drive at the following location:

[Municipal Agreement Rate Schedules \(P-drive\)](#)

They are also available on the Agility Coordinator's resource page:

[Municipal Agreement Rate Schedules \(Agility Resource Page\)](#)

For more information on Municipal Agreements and the associated rate schedules, refer to the [Maintenance Manual \(Pub23\), Chapter 10](#).

Municipal Agreement Rates Sample

ATTACHMENT "B" Municipal Services Comprehensive Maintenance Agreement Rate Schedule For Use During the 2024 - 25 Season

CATEGORY	ITEM	RATE	UNIT
Unpaved Roads	Shaping	\$940.84	Mile
	Dust Pallative	\$0.67	Square Yard
Unpaved Shoulders	Grading	\$1,036.49	Mile
	Dust Pallative	\$0.65	Square Yard
	Cutting	\$1,436.96	Mile
	Side Dozing	\$1.12	Foot
Pavement	Manual Patching	\$418.80	Ton
	Mechanized Patching	\$114.64	Ton
	Base Repair	\$108.00	Ton
	Skin Patching	\$5.90	Gallon
	Single Seal Coat	\$2.84	Gallon
	Crack Sealing Bituminous Surface	\$2,217.48	Lane Mile
	Crack and Joint Sealing Concrete	\$2,653.37	Lane Mile
Paved Shoulders	Manual Patching	\$341.08	Ton
	Mechanized Patching	\$89.57	Ton
	Base Repair	\$149.48	Ton
	Skin Patching	\$5.67	Gallon
Drainage/Cleaning	Clean Inlets	\$52.38	Each
	Clean Ditches	\$2.46	Foot
	Clean Pipes <36"	\$6.76	Foot
	Clean pipes >=36"	Negotiable	Foot
	Repair/Replace End Wall	\$636.87	Each
	Inlet Repair/Replace (Pre-Cast)	\$3,207.54	Each
	Repair/Replace Pipe and Culverts <36"	\$78.95	Foot
	Repair/Replace Pipe and Culverts >=36"	Negotiable	Foot
Miscellaneous	All Signs	\$46.29	Hour (1)
	Guiderail Repair	\$49.69	Hour (1)
	Mowing	\$110.32	Acre
	Mowing	\$108.21	Lane Mile
	Sweeping	\$149.45	Hour
	U-Drain	\$20.96	Linear Foot
	Concrete repair (labor, materials, equipment)	\$290.72	Square Yard
	Gabion Basket (includes everything)	\$462.77	Cubic Yard
	Austrian Pine 8' high - balled and burlaped	\$489.96	Each
	Velvet Pillar Crabtree	\$544.43	Each
	Shade Master Honey Locust Tree	\$680.53	Each

(1) Plus materials if the Department does not supply them

Published by the Commonwealth of Pennsylvania - Department of Transportation
Bureau of Operations

CREATING RP AND RR NOTIFICATIONS IN PLANT MAINTENANCE-HIGHWAY

After the Agility Work Plan has been fully executed (signed by all parties), the Plant Maintenance-Highway System must be used to develop two notifications:

- Agility Performed (RP) Notification and work order for the agility services to be performed by PennDOT for the partner
- Agility Received (RR) Notification for the work to be received by PennDOT from the partner. There is no work order required for work being provided by the partner to PennDOT.

These processes must be completed within 10 business days of the date the work plan was fully executed.

The Bureau of Maintenance, Systems and Support Division has created two End User Procedures (EUPs), one containing step-by-step instructions on creating a RP Notification and work order for agility services provided by PennDOT to the partner and one containing step-by-step instructions on creating a RR Notification for agility services received by PennDOT from the partner.

They can be found on the Agility Coordinator's resource page: [Agility EUPs](#)

ePayroll FOR PennDOT's CREWS

Coding a PennDOT ePayroll When PennDOT is providing an Agility Service

For the most part, completing an ePayroll entry for Agility work follows the standard procedure and coding described in the Highway Foreman Manual (Pub113), Chapters 2 and 3.

When completing an ePayroll for Agility work, pay particular attention to the following:

- **Header Data:**
 - All Header Data for Agility work is completed in the same way it would be for common highway maintenance work.
- **Work Orders, Work Order Reference (WR), WZTC, and Remarks:**
 - When Agility work is being performed, the Assembly used in payroll coding should always be in the Program 618 series. If you have questions about appropriate cost coding for Agility work, contact your Assistant Highway Maintenance Manager (AHMM) or Highway Maintenance Coordinator (HMC), or other appropriate manager in your county for assistance.
 - When completing this section for Agility work, leave the SR and Seg/Off fields blank.
 - When completing the Remarks for Agility work, make sure to include a note that work was completed as part of an Agility exchange and include the Partner name and Agility Agreement number (if known). Also include a brief description of the location where the work was performed (for example, include the municipality and road name with distance and direction from nearest crossroad, or include the name and address of the facility/property if work is being done at a partner facility or location other than a roadway)
- **Personnel:**
 - The Personnel section for Agility work is completed in the same way it would be for common highway maintenance work.
- **Equipment:**
 - The Equipment section for Agility work is completed in the same way it would be for common highway maintenance work.
- **Materials:**
 - If PennDOT is providing all or some materials as part of the service being exchanged under an Agility agreement, the Materials section for Agility work should reflect the PennDOT provided materials and quantities used. Do NOT enter Partner-provided materials into the ePayroll entry for the activity.
 - If the Partner is providing all materials for the service being exchanged under an Agility agreement (with PennDOT providing only Personnel and Equipment), the Materials section for Agility work would be left blank. Do NOT enter Partner-provided materials into the ePayroll entry for the activity.
 - If any Partner-provided materials are used, this should be reflected in the Remarks section discussed above. If a partner chooses to provide PennDOT with the materials needed to perform the service requested, the materials provided MUST meet PennDOT specifications.

DOCUMENTING PennDOT WORK DONE FOR PARTNERS: The PennDOT PDAS (MS-8A) FORM

The [PennDOT Agility Services \(PDAS\)](#) Form (MS-8A) should be used by the County Agility Coordinator (CAC) to document work done by PennDOT for partners as part of an Agility exchange and obtain and document the Partner's agreement that work was completed. In addition to providing a structured way for CACs to report PennDOT's work done on an Agility Work Plan to the partner, communicating PennDOT work completed in this way will help ensure better record keeping for the Work Plan as a whole, make partners feel more confident in working with PennDOT, and encourage better communication and flow of information with partners engaged in Agility exchanges.

The PDAS Form contains the following information:

- Agility agreement and Work Plan information
- Description of each service provided to the partner by PennDOT
- Type of work units and the total units provided for each service
- Date PennDOT provided each service to the partner
- Additional information: for example, this could include the location where each service was provided
- Signature of person completing the form and date

When PennDOT completes work for the partner under an Agility exchange, the PDAS form should be completed and sent to the partner with a cover email or memo requesting that the partner acknowledge acceptance of the work shown on the PDAS form. Copies of all PDAS forms, cover emails or memos, and partner's acceptances generated under each Work Plan should be kept in the Work Plan file.

PennDOT PDAS Form Sample

MS-8A (1-24)



pennsylvania
DEPARTMENT OF TRANSPORTATION
www.dot.state.pa.us

PennDOT's Agility Services (PDAS) Form
SAMPLE

AGREEMENT NUMBER	PARTNER NAME	WORK PLAN LETTER	DISTRICT/COUNTY
A25103	Millcreek Township	A	Erie

DESCRIBE SERVICES PROVIDED BY PennDOT	MEASURE OF WORK UNIT (Ex: hrs, miles)	TOTAL WORK UNITS PROVIDED	DATE SERVICES PROVIDED	ADDITIONAL INFORMATION
Crack Sealing	LM	2	05/14/2024	Swanville Rd., Millcreek Twp.

PENNDOT'S SIGNATURE	DATE	NAME (Please Print)
<i>Nick Miller</i>	05/21/2024	Nick Miller

DOCUMENTING PARTNER WORK DONE FOR PennDOT: THE PARTNER'S PAS (MS-8) FORM AND CONTRACTOR PAYROLLS

A County Agility Coordinator (CAC) is required to provide a [Partner's Agility Services \(PAS\)](#) Form (MS-8) to each Agility partner. This should be done as part of the materials provided when the partner receives their copy of the fully executed Agility agreement, but CACs should also consider providing a copy of the current version of the PAS form and accompanying instructions each time a new Work Plan is executed.

When a partner is actively providing service(s) to PennDOT under an Agility Work Plan, the partner must complete the PAS Form documenting the service(s) they provided and return it to their respective CAC every two weeks. If the Partner does not provide any services within any particular two-week period, the partner does not need to return a PAS form. If the partner is providing PennDOT with a continuous, ongoing service (for example, allowing PennDOT to store materials or equipment on its property for several months at a time), the partner need only return a PAS form documenting this activity once every six (6) months (generally in December and June).

After receiving PAS form(s) from Agility partner(s), the CAC must create and enter Contractor Payrolls in Plant Maintenance-Highway for each service provided by each partner. At MINIMUM, the CAC shall create and enter these contractor payrolls twice each year:

- by the fourth business day of January for partner services provided during the preceding July through December
- by the fourth business day of July for partner services provided during the preceding January through June

Note that this six-month contractor payroll entry cycle is a minimum deadline; the CAC can create and enter eContractor Services Payrolls at any time during the six-month cycle in which the work was performed, after receiving one or more completed PAS Form(s).

After the partner completes work for the Agility service exchange for PennDOT and reports that work by submitting a PAS form, PennDOT must complete an eContractor Services Payroll to record the production units provided to PennDOT. The procedure for this entry is the same as the normal procedure for eContractor Services Payroll (CS) entries found on the Agility Coordinator's resource page: [Agility EUPs](#)

There are a few special items to note about these eContractor Services Payroll entries for work performed by partners as part of Agility service exchanges:

- Notification:
 - Work done by partners for Agility service exchanges should be entered using the appropriate RR notification set up when the Agility work plan was executed. Use "RR" for the work center when starting your eContractor Services Payroll entry and the appropriate RR notification number when filling in the work order details table.
- Assembly:
 - After you have entered the Notification information and clicked the green "checkmark" icon, you should see an Assembly number beginning with program number "618" and production unit information that is appropriate for the service being received from the partner. If this information is incorrect, please contact the person in your office responsible for setting up RR notifications for assistance.

Partner PAS Form Sample

MS-8 (1-24)



Partner's Agility Services (PAS) Form

SAMPLE

AGREEMENT NUMBER A25103	WORK PLAN LETTER A	PARTNER NAME Millcreek Township
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DESCRIBE SERVICES PROVIDED TO PennDOT	MEASURE OF WORK UNIT (Ex: hrs, miles)	TOTAL WORK UNITS PROVIDED	STATE ROUTE	FROM SEGMENT/OFFSET	TO SEGMENT/OFFSET	DATE SERVICES PROVIDED
Bridge Cleaning	Site	1	832	0080/764	0090/443	05/24/2023

Partner Note: If applicable, each partner must complete the PAS form every two weeks to show the work the partner performed for PennDOT. This form must be sent to the county agility coordinator for work verification and approval. If no work was provided to PennDOT, do not send in the form.

PARTNER'S SIGNATURE <i>Sam Cabot</i>	DATE <i>5/28/2023</i>	PARTNER'S NAME (Please Print) Sam Cabot	DATE 5/28/2023
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WAS THE AGILITY SERVICE EXCHANGE A GOOD BUSINESS DECISION?

In order to determine whether or not the Agility service exchange was reasonably equal; compare the final costs for PennDOT to provide services to the partner against the estimated value of the total production units of services provided to PennDOT by the partner. Final actual costs incurred for an agility service provided by PennDOT to the partner, as well as the final production units of the services provided to PennDOT by the partner, can be found in Plant Maintenance. The value of the partner's services can be estimated using the partner's unit cost shown in the Work Plan.

For example: For the Agility work order shown below, PennDOT's final cost to provide services to the partner was \$1,581.14

Group/Descrptn	Est. costs	Plan costs	Act. costs	C.
Costs	0.00	0.00	1,581.14 U...	
DEPARTMENTAL EQUIPMENT	0.00	0.00	433.72 U...	
MATERIALS	0.00	0.00	228.11 U...	
PERSONNEL	0.00	0.00	919.31 U...	

and the total production units of the service received from the partner was 6 (as recorded via partner payrolls entered on the RR Notification, shown below), multiplied by the unit cost as stated in the work plan (\$343 per site) was \$2,058.

Reference object	Functional loc.	Equipment	Assembly
784-0120-H-0832	State Route 0832 Highways	Bridge Maint. Clean/Flush-Deck	618743101

A Positive Difference of: \$ 476.86

This analysis shows that PennDOT did not lose Motor License Fund dollars completing this agility service exchange. It also serves as a basis for costing out future work plans with the partner. Refer to the Agility Program Quality Assurance Review Worksheet located here:

[Other Work Plan Resources](#)

Agility Program Quality Assurance Worksheet Sample

Agility Program Quality Assurance Review **Worksheet**

Category D Indicators to determine "Reasonably Equal Services"

Worksheet #: _____

Workplan: _____

Activity	Value *	Score
Work plan services for RR or RP that are < or equal to \$5,000	+/- 25%	5 pts
	+/- 26%-30%	3 pts
	+/- 31%-35%	1 pts
	+/- 36%	0 pts
Work plan services for RR or RP that are > \$5,000 and < \$10,000	+/- 20%	5 pts
	+/- 21%-25%	3 pts
	+/- 26%-30%	1 pts
	+/- 31%	0 pts
Work plan services for RR or RP that are >\$10,000 and < \$50,000	+/- 15%	5 pts
	+/- 16%-20%	3 pts
	+/- 21%-25%	1 pts
	+/- 26%	0 pts
Work plan services for RR or RP that are >\$50,000	+/- 10%	5 pts
	+/- 11%-15%	3 pts
	+/- 16%-20%	1 pts
	+/- 21%	0 pts

***Value** = The difference between the value of Partner-provided services logged in PM compared to PennDOT's final cost

Purpose

The purpose of this tool is to evaluate how well PennDOT matches our costs, and ultimately our value, in an Agility exchange to what the value of what we received from the partner.

This scoring sheet should be used to evaluate each Work Plan to help develop better value within our agreements going forward.

Recommendations

Scores of 5 - this should be used as a benchmark for future exchanges

Scores of 3 - review for possible improvements when costing out future exchanges

Scores of 1/0 – a full review of the Work Plan costing process should be conducted, and a remediation plan completed and attached to show what the original problem was and how it can be avoided in the future.

EXPIRED AGILITY AGREEMENT WITH AN OPEN WORK PLAN

In general, Agility work plans should be structured so that work by both the partner and PennDOT under the work plan will be completed prior to the expiration of the Agility Agreement under which the work plan is created. When the County or District that established the work plan determines this is not possible, the first course of action should be to work with the partner and obtain a renewal of the Agility Agreement via a Renewal Letter. If a renewal is obtained, the expiration date of the original agreement is extended by three years and no additional actions are needed unless the work plan could not be completed within the additional three years.

If a work plan cannot be completed before the expiration of the agreement under which it was created AND the agreement has already been renewed and is not eligible for another renewal or a renewal cannot be obtained before the agreement expires, all work must cease until the following occurs:

1. A new agility agreement must be created and fully executed,
2. A new Agility Work Plan must be completed and signed by all parties and,
3. A “paper trail” must be developed from the old work plan to the new work plan

A sample of the “paper trail” needed from one work plan to the next is provided on the following page.

Note that the following information is provided on the **expired** work plan:

- Work completed by the partner under the expiring work plan
- Work that needs to be completed by the partner to fulfil the expired work plan (if any)
- Work completed by PennDOT under the expiring work plan
- Work that needs to be completed by PennDOT to fulfil the expired work plan (if any)
- A brief statement of why required work was not completed
- Number/letter for the new agreement and work plan under which the partner and/or PennDOT will complete the work required

Note that the following information is provided on the **new** work plan:

- A brief statement explaining that this work plan includes required work that was not completed under a previous agreement/work plan
- Number/letter of the expired agreement and work plan
- Work that needs to be completed by the partner to fulfil the expired work plan (if any)
- Work that needs to be completed by PennDOT to fulfil the expired work plan (if any)

Sample Expired Work Plan Excerpts

SAMPLE

Sample excerpt of documentation on an Agility Work Plan when the Agility Agreement expires before all the services have been provided - in this example, the partner owes PennDOT a service and they did not renew the agreement before the expiration date.

NOTE: no work can continue until a new agreement or renewal letter has been fully executed.

Agility Work Plan Letter:	<u>A</u>	Agility Agreement #:	<u>A25103</u>
Partner Name:	<u>Millcreek Township</u>		
Agility Agreement Expiration Date:	<u>3/30/2023</u>		
Agility Agreement Renewal Letter Expiration Date:	<u>N/A</u>		
WBS Element:	<u>T-A25103A9213-0120-618-2</u>	County:	<u>Erie</u>

Partner Completes

Services/Resources Received from the Partner	Planned Production Units	Unit	Unit Price	Total	Estimated Date of Completion	Completion Date Initials/Date Work Approved
Bridge Cleaning	6	Sites	343.00	2,058.00	10/28/2022	
The partner cleaned five of the six bridges. The one remaining bridge that was scheduled to be cleaned by 10/28/2022 was not completed under agility agreement number A25013 due to an oversight by the partner and is now scheduled to be cleaned in late spring of 2024 under a new agreement. The new agreement is A25111. Work Plan B has been developed in order to complete the remaining bridge cleaning under the new agreement. PennDOT provided the crack sealing services to the partner on 6/4/2021 as listed on work plan A under agility agreement A25103. No additional services are due to the partner from PennDOT.						
Totals				2,058.00		

Agility Work Plan Number/Letter:	<u>B</u>	Agility Agreement #:	<u>A25111</u>
Partner Name:	<u>Millcreek Township</u>		
Agility Agreement Expiration Date:	<u>3/30/2028</u>		
Agility Agreement Renewal Letter Expiration Date:	<u>N/A</u>		
WBS Element:	<u>T-A25111B9213-0120-618-2</u>	County:	<u>Erie</u>

Partner Completes

Services/Resources Received from the Partner	Planned Production Units	Unit	Unit Price	Total	Estimated Date of Completion	Completion Date Initials/Date Work Approved
Bridge Cleaning	1	Site	343.00	343.00	5/30/2024	
The bridge cleaning service documented on this work plan was to be provided under agility agreement #A25103, work plan A. The partner was not able to provide the bridge cleaning service before the agreement expired on 3/30/2023, therefore agility agreement #A25111 was fully executed and work plan B was developed in order for the partner to complete the service. PennDOT provided all services under work plan A, agility agreement #A25103, therefore no services are due from PennDOT to the partner on this work plan B.						
Totals				343.00		

COMMUNICATION LOG

The Communication Log is a tool that will be used to document communication between PennDOT and the partner.

PennDOT is required to notify the partner and confirm the date PennDOT will provide the service exchange to the partner. The Communication Log is used to document that PennDOT notified the partner of the date the service exchange is scheduled to begin, the person they contacted and a brief description of the communication. The partner is also responsible for notifying PennDOT when they are planning on providing the service to PennDOT. Communication from the partner must also be entered in the Communication Log.

The facing page of this manual shows an example of a simple communications log format that can be used for Agility purposes. If your County or District has its own Communications Log format already in use, this is also acceptable, as long as copies of Agility-related log entries can be placed in each related Work Plan file.

Sample Communication Log

Date/Initials	Person Contacted and Communication
7/10/2024 TC	S. Cabot contacted PennDOT to advise that Millcreek Township crews will be cleaning the Rt.832/I-79 bridge on Wednesday, August 20, 2024