

Work Breakdown Structure

Contents

- Project Development revised Chart of Accounts
A simplified version of a chart of accounts used by TLMA for accounting purposes. It is offered as a guide for segmenting project costs in a consistent manner and provides a basic work breakdown structure for a typical RCTD project.
- RCTD Program Level Schedule Activities
Provides a listing and related codes for a standard set of tasks/activities that are used by RCTD to track schedules for the Transportation Departments Capital Improvement Program (TIP).
- Link to Caltrans website containing a detailed Work Breakdown Structure (WBS) provided as a guide for the processing of a federally funded projects.

www.dot.ca.gov/hq/projmgmt/guidance.htm

PROJECT DEVELOPMENT ACTIVITY CODES

CODE	DESCRIPTION
Z1000	SURVEY (PHASE A)
Z1055	Preliminary Survey
Z1260	Design Survey
Z1000	DESIGN ENGINEERING (PHASE B)
Z1001	Design Management
Z1002	Management & Oversight
Z1003	Coordination (PDT's, functional divisions, agencies, utilities, public, partnering, etc...)
Z1004	Project Controls (scope, schedule, finance)
Z1005	Conceptual Design (Project Study Report)
Z1010	Research & Data Collection (as-builts, env studies, field reviews, utilities, right-of-way, etc...)
Z1030	Planning Studies (traffic, accident history, etc...)
Z1040	Alternative Concepts (reports, geometric drawings, estimates, analysis, recommendations, etc...)
Z1050	Preliminary Design (Project Report)
Z1150	Engineering Studies (hydrology, drainage, geotech, pavement, foundation, seismic, etc...)
Z1210	Preliminary Plans
Z1240	Preliminary Engineer's Estimate & Quantity Calcs
Z1235	Preliminary Engineering Review
Z1255	Final Design (PS&E)
Z1275	Final Plans
Z1380	Specifications & Special Provisions
Z1385	Engineer's Estimate & Quantity Calcs
Z1355	Certifications & Exceptions
Z1365	PS&E Review & Approval Processing
Z1370	Permit Processing (Caltrans, other agencies)
Z1500	ENVIRONMENTAL (PHASE C)
Z1501	Management & Oversight
Z1510	Document Preparation
Z1530	Processing / Review
Z1535	Special Studies
Z1610	Mitigation
Z1660	Permits / Agreements
Z2000	RIGHT-OF-WAY (PHASE D)
Z2035	Right-of-way Engineering
Z2065	Right-of-way Acquisition / Possession
Z2500	UTILITIES (PHASE E)
Z2520	Utility Relocations (cost related to actual relocation only, do not include coordination or research)
Z2530	Utility Services
Z3000	CONSTRUCTION ENGINEERING (PHASE F)
Z3006	Construction Contract Bid & Award Processing
Z3065	Construction Design Coordination
Z3120	Construction Claims Resolution
Z3125	As -Builts

Caltrans Phase	Group Code Range	Group Category	Code	Description (Less Detailed)	Code	Description (Detailed)	Scheduled Tasks
	100-149	Removed From TIP	100	Project was Dropped	100	Project was Dropped	
			110	Project was Annexed/Incorporated	110	Project was Annexed/Incorporated	Manually Set Removal Status
			120	Project was Conditioned to Developer	120	Project was Conditioned to Developer	
	150-189	Inactive	150	Project is On Hold	150	Project is On Hold	
			160	Project is On Hold (Pending Funding)	160	Project is On Hold (Pending Funding)	Manually Set Inactive Status
			170	Other	170	Other	
	190-199	Not Started	190	Pending Project Start	190	Pending Project Start	Auto Set if No Progress
K	200-299	Project Initiation	200	Pending Inter-Agency Agreements	200	Pending Inter-Agency Agreements	
			210	Preparing Inter-Agency Agreements	210	Preparing Inter-Agency Agreements	210 Inter-Agency Agreements
			220	Pending Design/Environmental Funding Authorization	220	Pending Design/Environmental Funding Authorization	
			230	Obtaining Design/Environmental Funding Authorization	230	Obtaining Design/Environmental Funding Authorization	230 Fund Authorization - DES/ENV
			240	Pending Design/Environmental Consultant Procurement	240	Pending Design/Environmental Consultant Procurement	
			250	Procuring Design/Environmental Consultant	250	Procuring Design/Environmental Consultant	250 Procure Consultant - DES/ENV
			260	Pending Conceptual Design Alternatives	260	Pending Conceptual Design Alternatives	
			270	Preparing Conceptual Design Alternatives	270	Preparing Conceptual Design Alternatives	270 Conceptual Design
			280	Pending Project Study Report	280	Pending Project Study Report	
			290	Preparing Project Study Report	290	Preparing Project Study Report	290 Project Study Report
0	300-399	PA & ED (Project Approval & Environmental Document)	300	Pending Right-of-Entry	300	Pending Right-of-Entry	
			305	Obtaining Right-of-Entry	305	Obtaining Right-of-Entry	305 Right-of-Entry
			310	Pending Preliminary Survey	310	Pending Preliminary Survey	
			315	Performing Preliminary Surveys	315	Performing Preliminary Survey	315 Preliminary Survey
			320	Pending Environmental Documents	320	Pending Environmental Documents	
			330	Preparing Environmental Documents	330	Preparing Environmental Documents	330 Environmental Docs
			340	Pending Preliminary Plans	340	Pending Preliminary Plans	
			350	Preparing Preliminary Plans	350	Preparing Preliminary Plans	350 Preliminary Design
			360	Pending Project Report	360	Pending Project Report	
			370	Preparing Project Report	370	Preparing Project Report	370 Project Report
			380	Pending Environmental Permits	380	Pending Environmental Permits	
			390	Processing Environmental Permits	390	Processing Environmental Permits	390 Environmental Permits
1	400-499	Design	400	Pending Final Plans Specs. & Estimates	400	Pending Final Plans Specs. & Estimates	
			410	Preparing Final Plans Specs. & Estimates	410	Preparing Final Plans Specs. & Estimates	410 Final Design (PS&E)
2	500-599	Right-of-Way/Utilities	500	Pending Right-of-Way Funding Authorization	500	Pending Right-of-Way Funding Authorization	
			510	Obtaining Right-of-Way Funding Authorization	510	Obtaining Right-of-Way Funding Authorization	510 Fund Authorization - ROW
			520	Pending Right-of-Way Engineering Docs.	520	Pending Right-of-Way Engineering Docs.	
			530	Preparing Right-of-Way Engineering Docs.	530	Preparing Right-of-Way Engineering Docs.	530 Right-of-Way Engineering
			540	Pending Right-of-Way Possession	540	Pending Right-of-Way Possession	
			550	Obtaining Right-of-Way Possession	550	Obtaining Right-of-Way Possession	550 Right-of-Way Possession
			560	Pending Utility Relocations	560	Pending Utility Relocations	
			570	Relocating Utilities	570	Relocating Utilities	570 Utility Relocations
3	600-699	Award Processing	600	Pending Encroachment Permits	600	Pending Encroachment Permits	
			610	Obtaining Encroachment Permits	610	Obtaining Encroachment Permits	610 Encroachment Permits
			620	Pending Construction Funding Authorization	620	Pending Construction Funding Authorization	
			630	Obtaining Construction Funding Authorization	630	Obtaining Construction Funding Authorization	630 Fund Authorization - CON
			640	Pending Award Process	640	Pending Award Process	
			650	Processing Award	650	Processing Award	650 Award Process
3	700-799	Construction	700	Pending Construction Management Consultant Procurement	700	Pending Construction Management Consultant Procurement	
			710	Procuring Construction Management Consultant	710	Procuring Construction Management Consultant	710 Procure Consultant - CM
			720	Pending Construction	720	Pending Construction	
			730	Under Construction	730	Under Construction	730 Construction
			740	Pending Final Seal Coat	740	Pending Final Seal Coat	
			750	Placing Final Seal Coat	750	Placing Final Seal Coat	750 Final Seal Coat
			760	Pending Landscape Establishment	760	Pending Landscape Establishment	
			770	Monitoring Landscape Establishment	770	Monitoring Landscape Establishment	770 Landscape Establishment
3	800-899	Project Close-Out	800	Pending Notice of Completion	800	Pending Notice of Completion	
			810	Processing Notice of Completion	810	Processing Notice of Completion	810 Notice of Completion
			820	Pending Final Progress Report	820	Pending Final Progress Report	
			830	Preparing Final Progress Report	830	Preparing Final Progress Report	830 Final Progress Report
			840	Pending Close-Out Process	840	Pending Close-Out Process	
			850	Processing Project Close-Out	850	Processing Close-Out	850 Project Close-Out
			855	Administrative Functions Only	855	Administrative Functions Only	
			860	Claims Resolution	860	Claims Resolution	
			865	Processing Acceptance into Road System	865	Processing Acceptance Into Road System	Manually Set Close-Out Status
			870	Obtain Right-of-Way Ownership	870	Obtain Right-of-way Ownership	
	900-909	Project Completed	900	Project Completed	900	Project Completed	Auto if all tasks complete or can be Manually Set

