White Paper 2016-16

How to Perform Project Re-Baselining
and Still Continue to Control the Project

Re-baselining during Project execution is sometimes inevitable when events make reference to the previously established baseline inadequate. This should remain a rare occurrence, inasmuch as any re-baselining exercise requires a lot of time and effort to be performed. A particular issue then arises, which is to continue to control the Project on the basis of the previous baseline while the new baseline is established and reviewed. In this White Paper we discuss all those challenges of Project re-baselining.

Re-baselining if needed during Project execution due to a significant change of circumstances that makes reference to the initial baseline inadequate will require as much effort as baselining and create temporary control challenges.

When to Trigger a Re-Baseline

In the course of the Project execution, changes might happen that have such a major significance that the entire Project execution plan needs to be re-baselined, because the current baseline is not any more a useful reference point and it is impossible to revert back close to it. It might result either from a very significant change, or from a less important change that has major consequences due to some external factor (e.g. in some conditions a relatively minor schedule delay might lead to missing the adequate season and push Project execution by one year). A key criterion is whether there is still some hope to come back close to the baseline through a recovery plan (at least in terms of execution logic), or if that appears impossible due to the circumstances.

> **The criterion for re-baselining is whether there is any possibility to revert back to the original baseline (in terms of execution logic)**

Performing a Re-Baselining Exercise

Re-baselining is a very significant exercise which aims as re-establishing a consistent baseline encompassing the Project execution strategy, scope, cost, schedule, risk. The amount of work is substantial and quite similar to the initial baselining (ref. White Paper 2016-14, although most of the data structure will not have to be redesigned. The Project Control manager has a fundamental role in orchestrating the re-baselining exercise and verifying that the final result demonstrates consistency between all disciplines.

In a large Project a re-baseline exercise can involve an extensive amount of work that can last 2 to 3 months to align all Project plans and structures to the new baseline. The amount of work is often underestimated by Project sponsors or clients, while it can be very significant if the exercise is done correctly.

When the re-baseline is applied, historical reference to the previous baseline needs to be maintained as a comparison point for macro indicators such as S-curves and key milestone dates.

Managing the Re-Baselining Exercise in Parallel to Project Execution

Implementing a re-baseline exercise at the same time as continuing to run the normal Project reporting and updating cycles on the basis of the previous baseline can be a challenge from the resource point of view, and needs to be carefully planned, as this effort will typically span over several months. Issuance of updated reference registers and schedules need to be coordinated in a clear manner to avoid confusion. Proper communication need to be maintained will all contributors regarding new expectations for planned dates.

During that period it is essential to continue updating the previous reference for actual and forecast data to ensure a continuous Project piloting. However, that reference is now not really applicable to the Project. This will create problems between what is reported and what is really happening and it is a dangerous situation from the perspective of keeping the Project in control.

Unfortunately this transition phase sometimes lasts longer than it should due to the ongoing commercial

> **Continuing to control the Project during the re-baseline exercise on the basis of the previous baseline can be a significant challenge.**

discussions that are inevitably tied to the re-baselining exercise. Project and Client alike will use the schedule to found commercial arguments, which might lead to stretch the use of the initial obsolete schedule reference, and produce schedule extracts that are commercially-driven. The Project baseline generally needs formal approval by the Client. This might delay significantly the formal application of the new baseline.

There is no good solution to that bind. It is not recommended for the Project to work against a second non-official Integrated Project Schedule. Because only the Integrated Project Schedule is generally due for approval, the recommended way forward for the transition phase is to update all the lower level registers and detailed schedules that drive the work at deliverable level according to the new baseline intent in terms of forecast dates, and manage the inconsistencies with the

Integrated Project Schedule which will retain the initial baseline for a while.
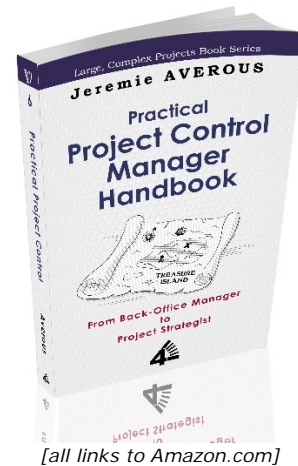
Conclusion

Re-baselining is an exercise which effort and duration is too often underestimated. At the same time, continuing Project execution when the reference is being changes can always be tricky and commercial discussions do not help keep this transition phase short and easy.

Re-baselining exercises should thus be approached with care and method to be successful. A specific work plan is recommended with clarity to the team as to which version of the various registers and schedules is applicable.

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