



FACILITIES MANAGEMENT
Project Delivery Program

Project Delivery Overview

June 2013

Project Management Concept

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Project Management Concepts

- **Three distinct areas to be aware of:**
 - **Statute**
 - State Law
 - **Policy**
 - University and System Policies
 - **Process**
 - Developed by the department to ensure efficiency and compliance with above referenced statutes and policies



Project Management Concepts

The title “Project Manager”, while emphasizing the importance of overseeing and monitoring a project, can cause one to overlook other leadership skills needed to successfully lead a project to completion. A Project Manager is both a “manager” and a “leader.” There are six major responsibilities associated with the roles of manager and leader.

- 1. Focus on the Customer**
- 2. Create the Project Vision**
- 3. Build and Maintain the Project Team**
- 4. Plan the Project**
- 5. Managing Resources**
- 6. Ensuring Quality**

Project Management Concepts

- A “customer” is a person or organization that is the primary user of the end product or service.
- A “stakeholder” is a person or organization that has a stake or interest in the project.
- The “executive team” is a group of people that have the final contractual or project cost approval authority.
- A “neighbor” is a person or organization whose facility or interest normally border or touch a project or project site.

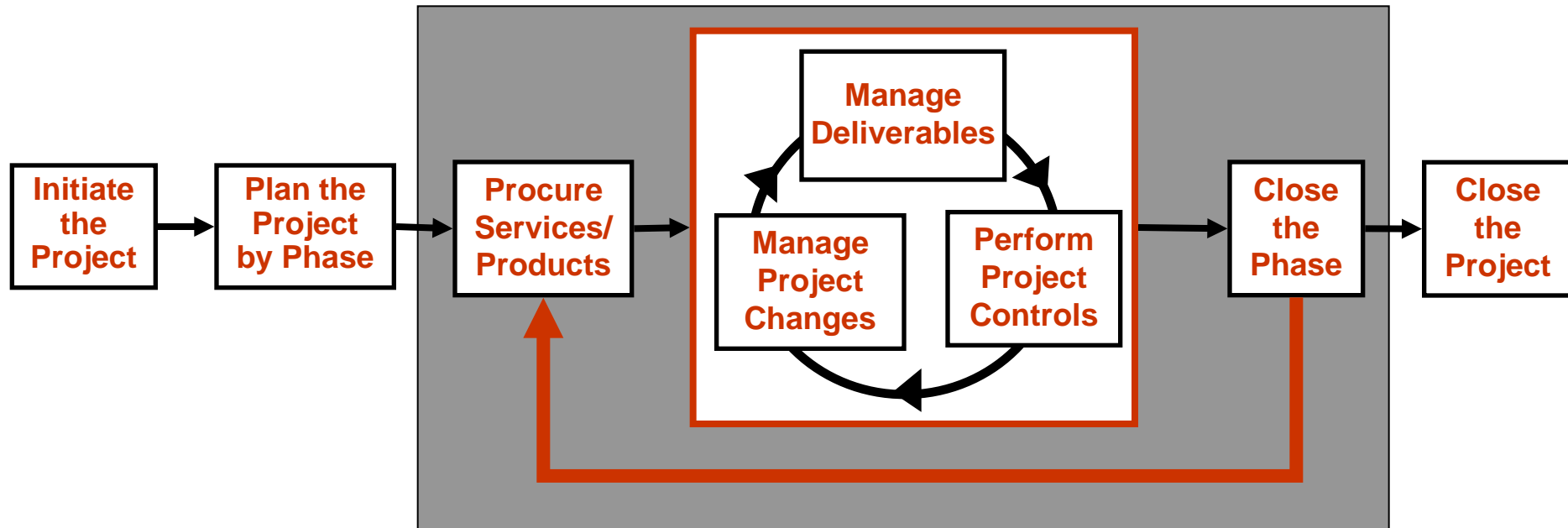
Project Management Concept

Additional keys to successful project delivery include:

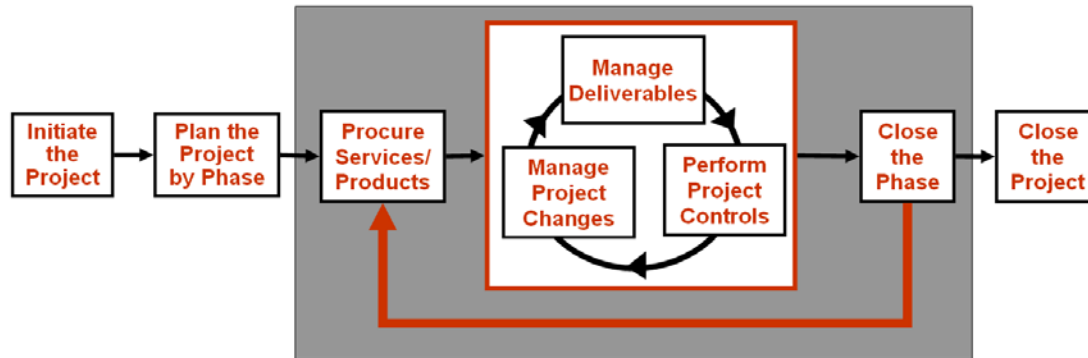
- Well-developed and endorsed project work plan
- Project tools
- Performance measures and metrics
- Project chartering and project contact list at the start of the project
- Constant contact
- Meeting minutes
- Establish and meet your major milestones

The benefits of a well-developed project delivery process are satisfied customers who receive high-quality projects that routinely meet expectations, costs, and schedule goals; and a consistent customer focus that is adaptable to ever-changing demands and challenges.

Project Process Overview



Step 1: Needs Development



Project
Request
Received



Project
request vetted
for assignment



Project
request
assigned

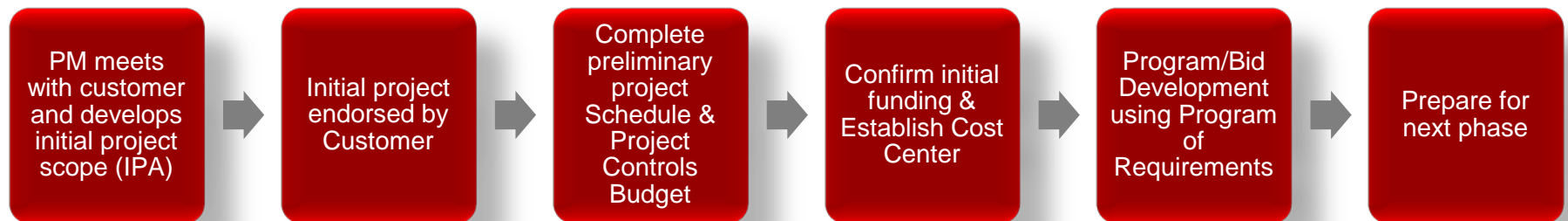
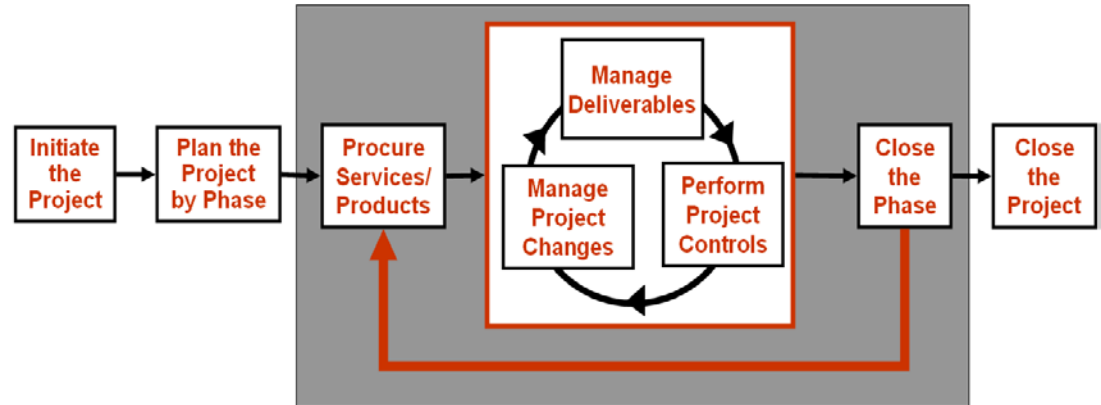
Step 1: Needs Development

All Facilities Management projects will be under \$4M and begin one of five ways before being assigned and initiated in FM:

- Capital Request
- Capital Renewal and Deferred Maintenance (CRDM)
- Emergencies
- Online Work Request (OWR)
- Customer requests via phone (Facilities Service Center)

Based on the request, the project will be assigned to the appropriate service area. The “Needs Development” step in the project delivery process refers to when a project is assigned to a Project Manager in FM and/or initiated by FM.

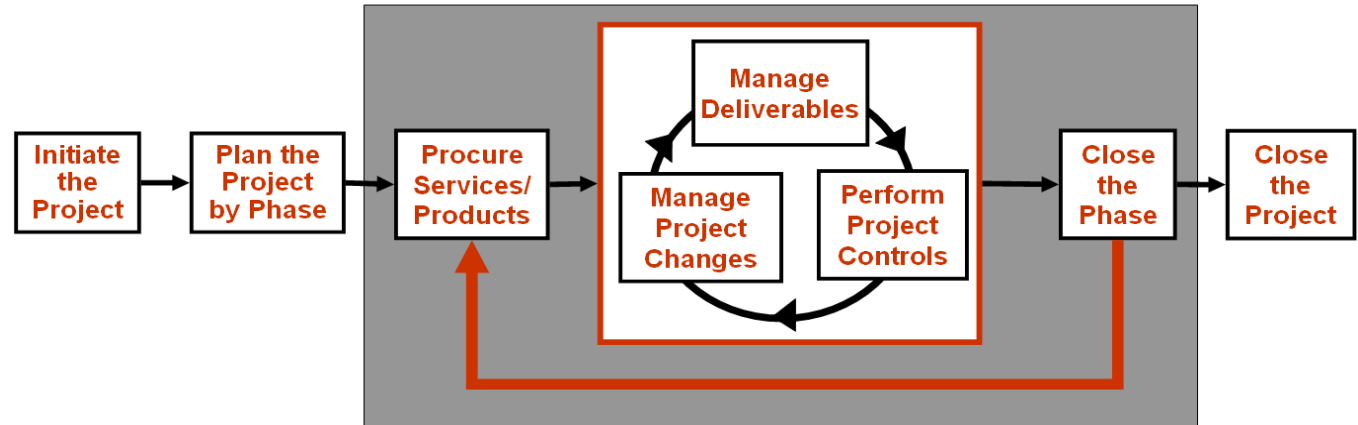
Step 2: Scope Development



Step 2: Scope Development

- The focus of this step is preparing the project charter and initial project scope.
- Chartering is a structured process used to guide the project team through the defining the project purpose, critical success factors, goals, roles and responsibilities and other elements that ensure a high-quality performance.
- This phase includes developing the project definition and vision, establishing the Project Team, defining project objectives and requirements, and project set-up in the work management system.
- At the end of this step, the project will have received all customer approvals and funding authorizations.

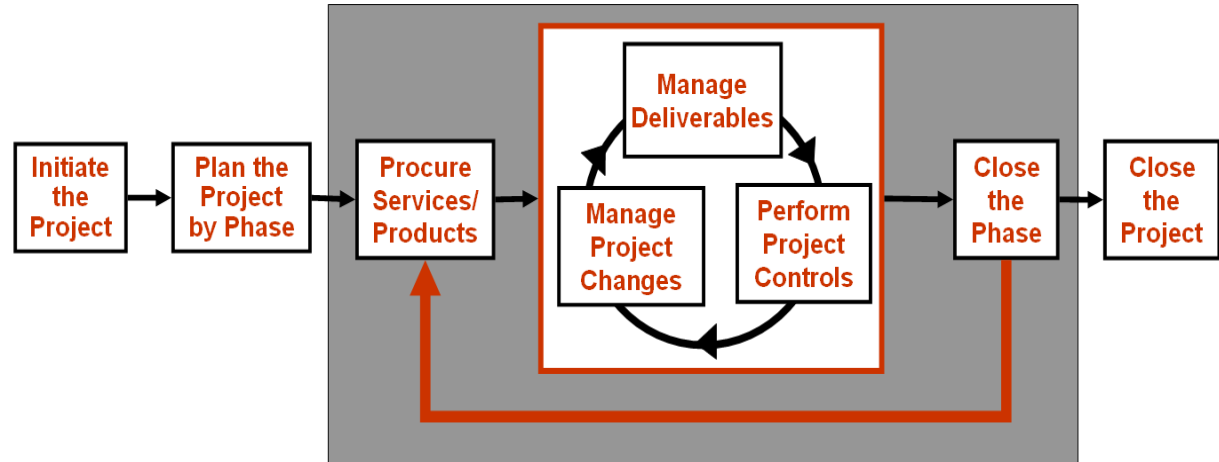
Step 3: Procurement of Design Team



Step 3: Procurement of Design Team

- This phase includes procuring the design products and services required for successful project design delivery.
- The two primary methods of procuring these services are:
 - Continuing Services Agreement (CSA) process
 - Request for Qualifications (RFQ) process
- If a commissioning agent will be utilized, this service should be selected parallel to the selection of the design team and engaged throughout the life of the project.

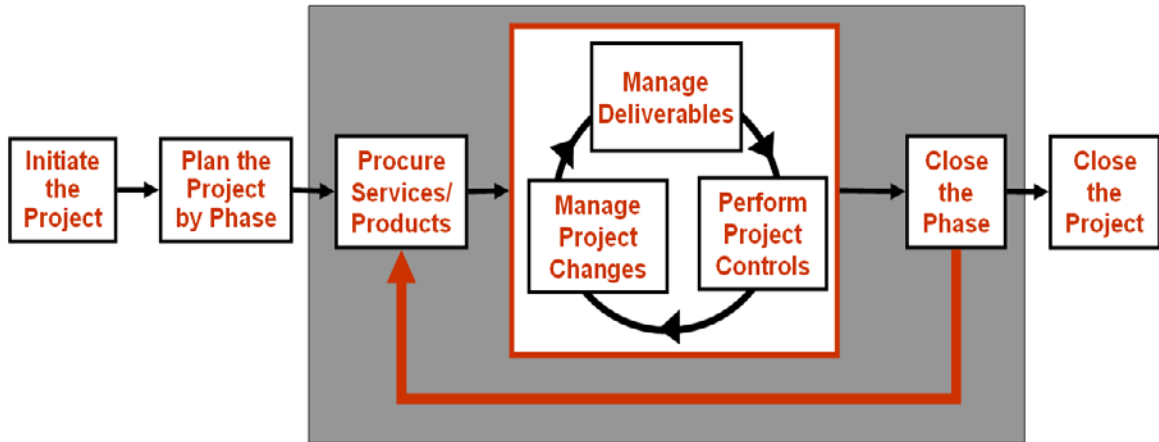
Step 4: Design Phase



Step 4: Design Phase

- Continuously monitoring the scope of work being designed and comparing it to the scope of work planned and budgeted is critical.
- The Project Manager proactively ensures that the project meets expectations within the defined constraints, including delivering a project on time and on budget. As a result of managing deliverables, change may be deemed necessary.
- All designs should adhere to the [Campus Design Guidelines and Standards](#). Any variance must be presented and approved by the Campus Core Team and a signed variance form must become part of the project record.

Step 5: Bid / Procurement of Contractor

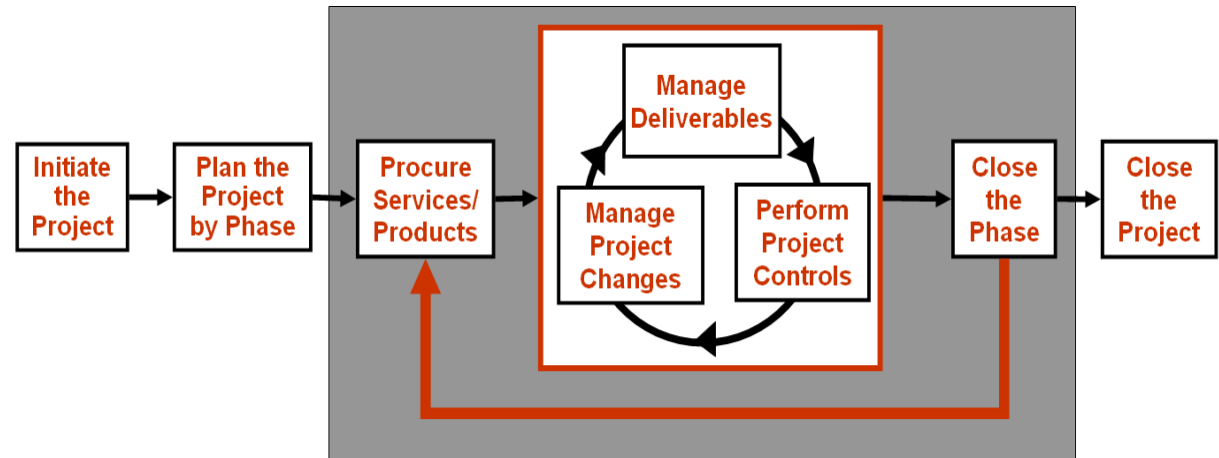


Step 5: Bid / Procurement of Contractor

- This phase includes procuring the construction products and services required for successful project delivery.
- Methods of contractor selection include:
 - Informal Competitive Bidding
 - Job Order Contractor (JOC)
 - Invitation To Bid (ITB)*
 - Formal Competitive Sealed Proposal (RFP)
- This phase also includes the procurement of Owner Provided Services

* Invitation To Bid (ITB): Approval by Executive Director must be granted prior to using this method.

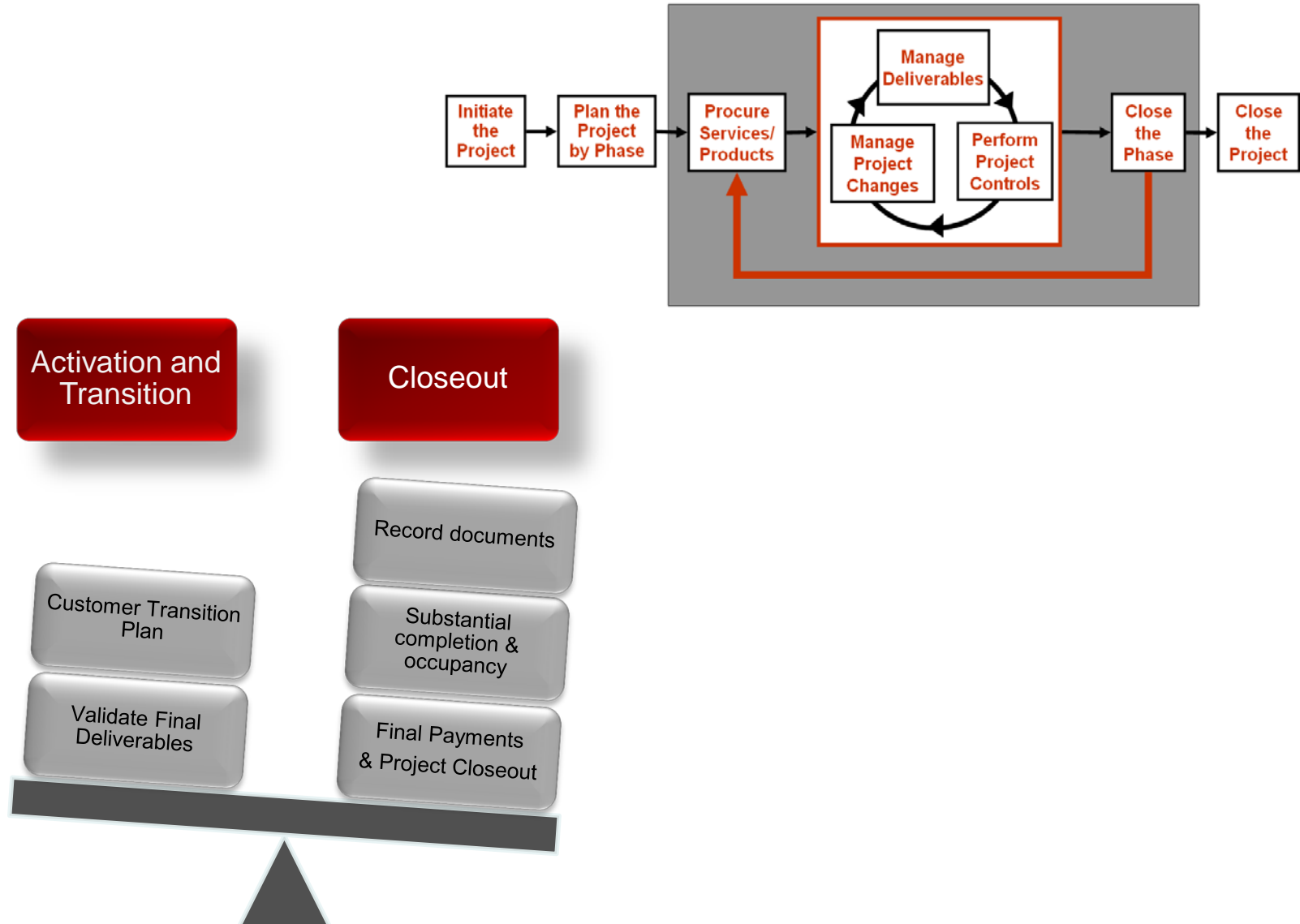
Step 6: Construction Phase



Step 6: Construction Phase

- Continuously communicating and monitoring the scope of work being constructed and comparing it to the scope of work that was designed is critical.
- The Project Manager proactively ensures that the project meets expectations within the defined constraints, including delivering a project “on time and on budget.” Inspections of work should take place throughout this phase.
- As a result of managing deliverables, change may be deemed necessary. Developing appropriate guidelines and processes for addressing change is crucial to a successful project.

Step 7: Activation, Transition and Closeout



Step 7: Activation, Transition and Closeout

- Project transition, activation and close-out captures the last construction-related issues including customer transitions, building systems activation, systems training, administrative (collection/distribution of Operations and Maintenance Manuals, Warranties and all other project documents), financial and contracts closeout and collecting project evaluations and assessments.

Other Items of Significance

- **Green Light Report**
- **Project Reporting & Close Out Form**
- **Weekly Project Highlights (over \$250K)**
- **Public Records**
- **Non Emotional, Factual & Brief Communications**
- **Encourage person-to-person communication (*pick up the phone*)**
- **Own the Message...**
- **Know when to Escalate!**

Keys to Success:

UTILIZE YOUR PROJECT DELIVERY MANUAL & YOUR PM TOOLS!

- Communication
- Resource Management
- Change Management
- Project Tools
- Support Processes

Questions / Discussion