

Advanced Design Project Management



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1 - AIA Continuing Education Credit



AIA
Continuing
Education
Provider

Credit(s) earned on completion of this course will be reported to American Institute of Architects (AIA) Continuing Education Session (CES) for AIA members.

Certificates of Completion for both AIA members and non-AIA members are available upon request.

This course is registered with AIA CES for continuing professional education. As such, it does not include content that may be deemed or construed to be an approval or endorsement by the AIA of any material of construction or any method or manner of handling, using, distributing, or dealing in any material or product.

Questions related to specific materials, methods, and services will be addressed at the conclusion of this presentation.

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Course Description

Design Project Management

This class will focus on basic effective fundamental procedures for managing the project design process.

Topics include how to understand and administer the design process, how to interview, select and hire a design consultant, how to get the best from your architect/engineer, how to work and communicate with your campus client, effective communication strategies, what to look for in design reviews, and the importance of program and budget conformance.

Review successful processes for value engineering, effective team management, communication, and basic project manager skills.

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Learning Objectives

1. Learn the basic fundamental procedures for managing project designs.
2. Learn how to understand and administer the design process.
3. Learn how to get the best architect/engineer.
4. Learn how to interview, select and hire a design consultant.

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This concludes The American
Institute of Architects Continuing
Education Systems Course

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APPA Institute
 Design Project Management



Fun in the air




Grandsons

Kids

- Licensed Architect
 - Colorado
 - Georgia
 - North Carolina
 - Louisiana
- Private Practice 15 years
- Higher Education 27+ Years
 - Duke University - 6 Years
 - Director Facilities Design Office
 - Assistant Dean Facilities
 - University of Colorado -13 Years
 - Director PDC
 - Campus Architect
 - AVC FM
 - Emory University – 5- 1/2 Years
 - AVP PDC
 - University of Colorado -3 Years
 - VC Administration

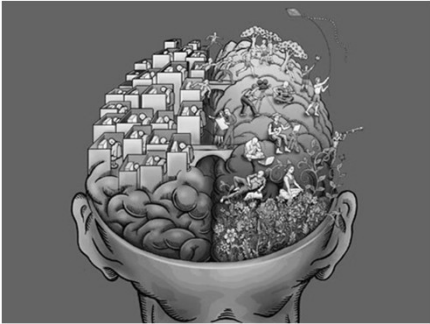




Resources Available

- Design Guidelines
- Construction Standards
- Project Checklist
- Project Management Service Levels
- Consultant Information Packet
- Quest for Quality Guidelines
- A/E Quality Assurance Program
- A/E Fee Guidelines
- A/E Agreement
- Review Reminders
- A/E Performance Evaluations

<http://www.colorado.edu/facilitiesmanagement/appa/>



Revenge of the Right Brain!

What are your Goals?

My Goals:

Understand the Design Process
Manage the Design Process

DESIGN PROJECT MANAGEMENT

Project

- Traditional Project
- Design / Bid / Build
- Major Project

Seminar

- Programming Complete
- Project Approved
- Project Funded
- Process Ends @ Bidding



Seminar Assumptions

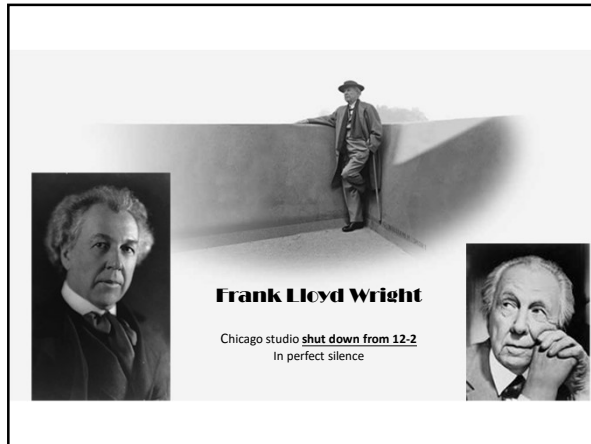
Architectural Education

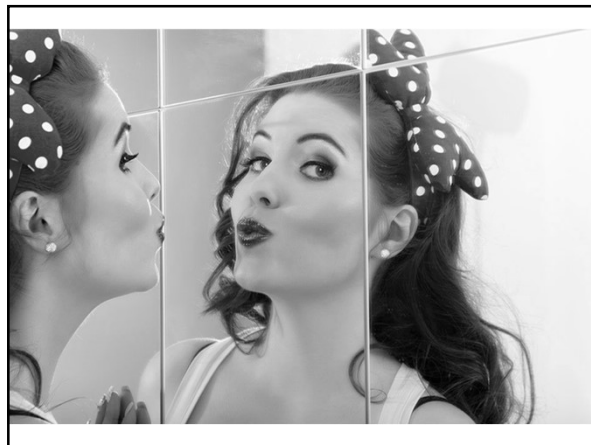


	APPA Institute Design Project Management	
<u>Overview</u> Design Process Project Team Design Process Tools Managing the Process		 Deferred Maintenance or Capital Renewal?

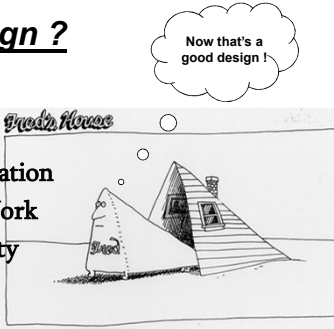
	APPA Institute Design Project Management	Design Process
<u>Part 1-Design Process</u> • Design Process • Project Schedules • Project Deliverables • Designing For Value		

 How do you get ideas?



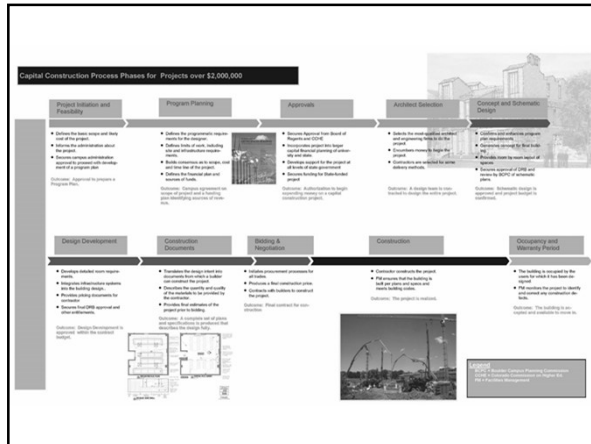




	APPA Institute Design Project Management	Design Process
<u>What is Design ?</u> Moments of Inspiration Periods of Hard Work Continuous Activity  <i>Freda Flowers</i>		

	APPA Institute Design Project Management	Design Process
<u>Influences on Design</u> • Program • Codes / Regulations • Site / Context • Technology • Cost / Schedule • Client  <i>Early Art Critic</i>		

	APPA Institute Design Project Management											
<u>Design Process</u> • <u>Analysis</u> <table border="0" style="width: 100%;"> <tr> <td>Program</td> <td>Scheduling</td> </tr> <tr> <td>Site</td> <td>Cost</td> </tr> <tr> <td>Code</td> <td>Constructability</td> </tr> </table> • <u>Synthesis</u> <table border="0" style="width: 100%;"> <tr> <td>Goals</td> <td>Concept</td> </tr> <tr> <td>Alternatives</td> <td></td> </tr> </table> 			Program	Scheduling	Site	Cost	Code	Constructability	Goals	Concept	Alternatives	
Program	Scheduling											
Site	Cost											
Code	Constructability											
Goals	Concept											
Alternatives												



	APPA Institute Design Project Management	Deliverables
<u>Design Phases / Deliverables</u> • <u>Schematic Design</u> Plans / Elevations Sections / \$ Estimate Outline Specs Design Summary / Analysis • <u>Design Development</u> Expanded SD Set • <u>Construction Documents</u> Detailed Plans Prairie Dog Developers		

	APPA Institute Design Project Management	Communication
<u>Design</u> • All Project Phases <u>Communicate</u> • <u>Client</u> • Programming • <u>Professionals</u> • Schematic Design • Design Development		

	APPA Institute Design Project Management	Communication
<u>Design</u> • All Project Phases <u>Communicate</u> • <u>Client</u> • Programming • <u>Professionals</u> • Schematic Design • Design Development • <u>Contractor</u> • Contract Documents • Construction		Revision #46 dated 1/5/11

	APPA Institute Design Project Management	Schedules
<u>Project Schedules</u> • A/E Selection • Contract Negotiations • Schematic Design • Design Development • Construction Documents • Bidding / Contract Award • Construction • Close Out • Warranty Period		At this rate...you'll never finish on time

	DESIGN PRODUCTION SCHEDULE Example of Typical Design Production Schedule (Originally Prepared for The Logan School - Partial Schedule Only) → Week of February 27 Contractor Coordination Meeting: MCA Coordinate meeting Consultants Advise of what information required to develop preliminary budget, design Advise of Survey, Testing, or existing conditions information needed from Owner Provide first pass square footage cost information Review Diagram Options Building Committee Meeting: Information, Overview, Roles Logistics Authorize commencement of Civil Engineering Review and approve Schedule Information to be provided by Owner (identify items and schedule: asbestos, survey, hazardous material tests, easements, other items?) MCA Agenda and presentation materials → Week of March 6 Building Committee Meeting: Diagrams of overall design solutions Cost #1's based on Square Footage Costs UNBES Decision on selection and approval of diagram Review first pass square footage costs MCA Agenda and presentation materials Begin Regulatory Agency Meetings: LEPA/Zoning Denner Building (Architectural, Mechanical, Electrical) Denner Fire Department Commission for Disabled Logistics Representative may want to attend MCA Set up and conduct meetings with regulatory agencies Consultants Mechanical, Electrical, Civil meet w/ regulatory agencies as required Site Visits: Review of Existing conditions in portion of the building to be renovated Structural: squash court wall
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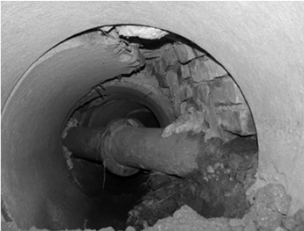
	APPA Institute Design Project Management	Design for Value
<u>Designing For Value</u> • Maintainability		



	APPA Institute Design Project Management	Design for Value
<u>Designing For Value</u> • Maintainability • Life Cycle Cost • Value Engineering 		

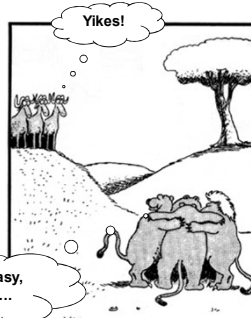


I call it "Value Shifting"

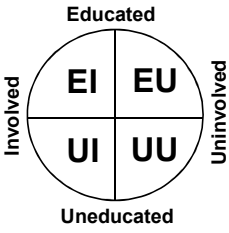
	APPA Institute Design Project Management	Design for Value
<u>Value Management Approach</u>		
• <u>Tier 1</u> • Gypsum Board • Lighting Package • Direct Purchase • <u>Tier 2</u> • Relocate Plumbing • <u>Tier 3</u> • Scope Reductions  "Tell you what skeeter; It's about quittin' time and family feud is almost on. Just ram that thing right through it. It's 10 foot underground, ain't nobody ever going to see it." ~ Utility Contractor, circa 1976		

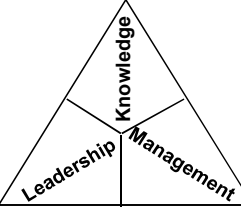
	APPA Institute Design Project Management	Design for Value
<u>Designing For Value</u>		
• Maintainability • Life Cycle Cost • Value Engineering • Present Value  Ned Beally, of Beally Construction Co., helps his children with a Lego® Mindstorms® robotics project. Oh big surprise. Another announcement of cost overruns and delays.		

	APPA Institute Design Project Management	Project Team
<u>Part 2</u> <u>The Project Team</u> • Assembling The Team • Selecting The Team • Team Members & Roles  Wildlife Day Shifts		

	APPA Institute Design Project Management	Project Team
<u>Assembling The Team</u> • Owner • Consultants • Construction Team • Supporting Cast 		

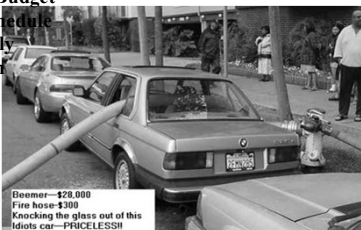
	APPA Institute Design Project Management	Project Team
<u>The Project Team</u> <u>Owners</u> • Client • User • Committees • Facilities Management • Others 		

APPA Institute Design Project Management	Project Team
<u>Owners</u> • <u>Experienced</u> Educated / Involved Educated / Uninvolved • <u>Inexperienced</u> Uneducated / Involved Uneducated / Uninvolved	

APPA Institute Design Project Management	Consultants
<u>What is a Consultant ?</u> • <u>Professional Advice</u> Knowledge / Expertise Leadership (transformational) • Doing the Right Thing • Inspiring • <u>Management</u> (transactional) • Doing Things Right • Day to Day Activities	

APPA Institute Design Project Management	Design Team
<u>The Design Team</u> • <u>Designers</u> Architect - Usually Prime	

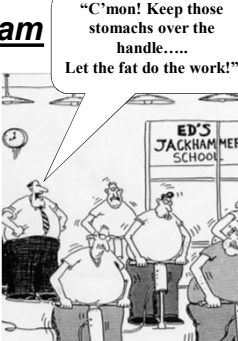
	APPA Institute Design Project Management	Design Team
<u>The Design Team</u> <u>TEN Deadly Sins</u> 1. Team Changes 2. Multiple Contacts 3. Schedule Delays 4. Over Design 5. Negative Approach 6. Low Quality Product 7. Slow Response 8. Slow Review 9. Weak Leadership 10. Close Out 		

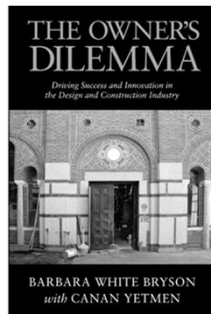
	APPA Institute Design Project Management	Design Team
<u>What You <i>Should</i> Do</u> • Have a Clear Decision Making Process • Develop a Complete Program • Establish an <u>Adequate</u> Budget • Establish a <u>Realistic</u> Schedule • Communicate Effectively • Hire a Compatible Firm • Guard Against Scope Creep • Deliver Bad News Promptly • Expect to Pay Reasonable Fees 		

	APPA Institute Design Project Management	Design Team
<u>What You <i>Should Not</i> Do</u> • Do Not Rely on Clairvoyance • Do Not Make Impossible Promises • Do Not Accept Sloppy Work • Do Not Expect Perfection • Do Not Expect Added Scope for Free 		

 APPA Institute Design Project Management	
Architect Expects • Clear Direction • Instantaneous Decisions • Tightly Defined Scope • Comfortable Budgets • Fair Treatment • Profitable Fees • Quality Design Expectations	Architect May Get • Ambiguity • Extensive Collaboration • Scope Creep • Inadequate Budgets • Unreasonable Contracts • Gift Opportunities • Low Design Expectations
You Expect • Exceptional Service • Adherence to Budgets • Meeting Schedule Milestones • Comprehensive Services • Complete Drawings • Cost Effective Design	You May Get • Nonchalance • Budget Busters • Delays • Requests for Additional Fees • Errors & Omissions • Extravagance

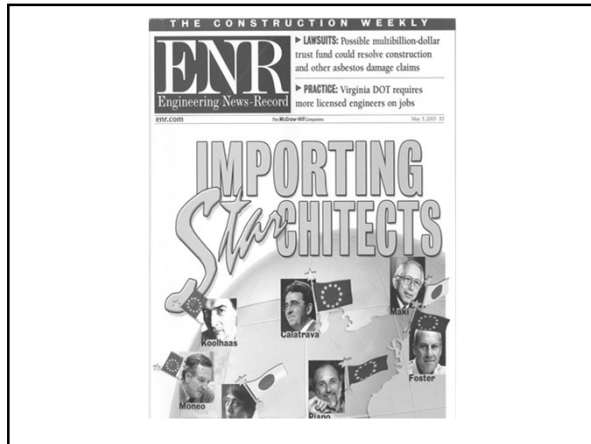
 APPA Institute Design Project Management	
The Design Team • <u>Designers</u> • Architect - Usually Prime • <u>Engineers</u> • 25% to 65% of Cost • <u>Others</u> • Planner • Commissioning Agent • Landscape Architect • Interior Designer	Design Team 

 APPA Institute Design Project Management	
The Construction Team • <u>Contractor</u> • GC - avg. < 10 employees • Design Build • Construction Manager • <u>Subcontractors</u> • <u>Suppliers</u> • <u>Laborers</u>	Construction Team 

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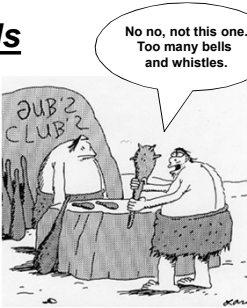
	APPA Institute Design / Project Management	Project Team
<u>The Project Team</u> • <u>Supporting Cast</u> - Finance Accounting - Insurance / Risk Mgt. - Regulators - Legal - Others 		

	APPA Institute Design Project Management	Team Selection
• <u>Approaches to Selection</u> Direct - Resources - Experience - Ability - Compatibility - Cost - Ideas Comparative – Brooks Act Competitions		<u>Selecting the Design Team</u> 



	APPA Institute Design Project Management	Team Selection
<u>Selecting the Consultants</u> • Owner Selects • Prime Selects Subs • Combination		Competition in nature



	APPA Institute Design Project Management	Process Tools
<u>Part - 3</u> <u>Design Process Tools</u> • Communication • Negotiations & Fees • Design Process Tools 		

	APPA Institute Design Project Management	Communication
<u>Communication</u> • <u>Talking</u> • <u>Listening</u> Effective communication = 80%+ of project problems  		

 Body Language 55% <u>How</u> we say it 38% <u>What</u> we say 7% 😊
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People Only Hear
Every 3rd Word

People Only Retain
Every 5th Word...

 APPA Institute Design Project Management	Communication 
• <u>Talking</u> • <u>Listening</u> • <u>Writing</u> <u>Communication</u>	
	

 APPA Institute Design Project Management	Communication
• <u>Talking</u> • <u>Listening</u> • <u>Writing</u> • <u>Meetings</u> <u>Communication</u>	
Where minutes are taken and hours are lost  Mark Bristol UNC	

APPA Institute
Design Project Management

Communication

- Talking
- Listening
- Writing
- Meetings
 - Alternatives
 - Prepare Agenda / Send Ahead
 - Start / Finish on Time
 - Short 'n Sweet
 - Prepare
 - Confirm

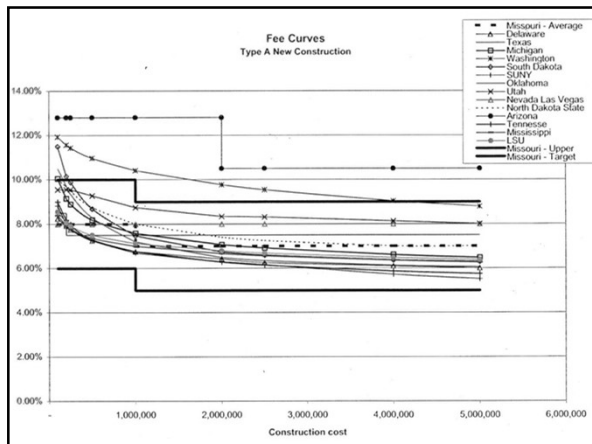
Communication

APPA Institute
Design Project Management

Fees

Negotiations & Fees

- Fee Structure
- Negotiating



APPA Institute
 Design Project Management

Negotiations

3 Types of Negotiations

- Soft
- Hard
- Principled

My project is ready for grading,
Mr. Bignose.
Hey, I'm talking to you squidbrain!

Types of Negotiation

	Soft Negotiation	Hard Negotiation	Principled
The Goal	Reaching and Agreement	Winning	Mutuality: A Wise Outcome
Participants	Friends	Adversaries	Problem Solvers
About the Relationships	Make concessions to cultivate the relationship	Demand concessions as a condition of it	Separate people from the problem
Trust of Others	You do	You do not	Proceed independent of trust
Your position	You change readily	You dig in and hold	Focus on interests, not on positions; explore interests
Your bottom line	You disclose	You hide and mislead about	Avoid having a bottom line
To reach agreement	You accept one-sided losses	You demand one-sided gains	Invent options for mutual gain
You insist on	Agreement	Your position	Insist on using objective criteria; yield only to principle
Contest of Wills	You try to avoid	You try to win	
Pressure	You yield to	You apply	
The Architect's Fear	I'll probably lose	I'll endanger the relationship	

APPA Institute
 Design Project Management

Tool Kit

Design Process Tool Kit

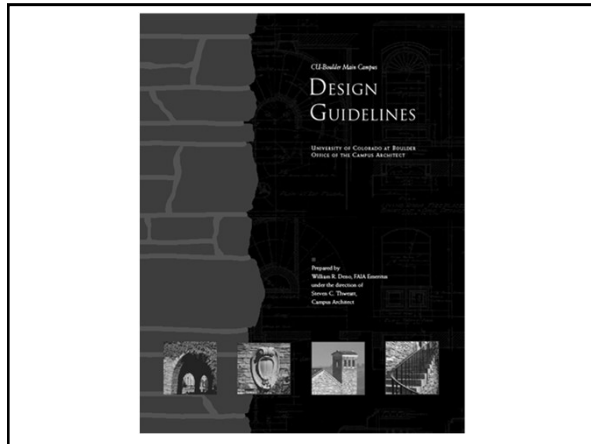
**Project Manager
Multi-Tasking**

<http://www.colorado.edu/facilitiesmanagement/appa/>

	APPA Institute Design Project Management	Tool Kit
• Consultant Instructions 		

	Consultant's Information Packet	
Table of Contents • Cover Letter • Communicating • Project Contact List • Capital Construction Process • Reviews of Architectural Plans and Specifications • Academic Calendars • Other Materials - Campus Master Plan - Campus Parking Map - Campus Visitor Map - Body & Soul: Architectural Style at the University of Colorado at Boulder Cover Letter: The Consultant's Information Packet is available to help designers understand the process and procedures of the University of Colorado at Boulder. Please review this material before the kick-off meeting so that we may answer any questions you may have. Be sure as you start this project, that you have a complete and current copy of the UCB (University of Colorado at Boulder) Standards. These have been put together to assist you, sharing with you our experience and needs. These standards are frequently updated and it is important that you use the most up-to-date version in preparing plans and specifications. Also, let us share a couple of key thoughts about your project team and project management on campus.		

	APPA Institute Design Project Management	Tool Kit
• Consultant Instructions • Design Guidelines		



	APPA Institute Design Project Management	Tool Kit
• Consultant Instructions • Design Guidelines • Construction Standards		

	APPA Institute Design Project Management	Tool Kit
• Consultant Instructions • Design Guidelines • Construction Standards • Planning Template		

CU Budget Planning Tool

<http://www.colorado.edu/facilitiesmanagement/appa/>

	APPA Institute Design Project Management	Tool Kit
• Consultant Instructions • Design Guidelines • Construction Standards • Planning Template • Service Levels		

 Facilities Management University of Colorado at Boulder <i>Planning, Design & Construction</i> Project Management Service Options 1. <u>Minimum service level:</u> In this service option, the client can provide the project management and coordination services for their project with the following minimum involvement from Facilities Management: ➤ Contracts & procurement, ➤ Construction permitting, ➤ Inspections, ➤ Change order processing (the client can negotiate change order costs), ➤ Environmental site assessment and abatement requirements through EH&S, ➤ Projects must adhere to the UCB construction standards with deviations specifically approved by the Executive Director of FM and FM must have the ability to verify compliance, ➤ Utility outages, ➤ Code compliance including project reviews by code officials (Authorities Having Jurisdiction). 2. <u>Intermediate service level:</u> In this service option, FM must provide the minimum levels of services as outlined in service option 1 and the client can negotiate with FM for the level of services for the following: ➤ Project budgeting and estimating, ➤ Project schedule development.
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 APPA Institute Design Project Management	Tool Kit
• Consultant Instructions • Design Guidelines • Construction Standards • Planning Template • Service Levels • Outage Notices	

SCHEDULED WORK ACTIVITY AND SIDEWALK /VEHICULAR OUTAGE AT West Pleasant Street To: Linda Fry -Hale Sciences Proctor From: Gil Fike, Project Manager <u>Building:</u> Hale, McKenna, and Old Main Buildings <u>Start Date:</u> Wednesday, August 14, and Thursday August 15, 2002 <u>Duration:</u> Full Time Pedestrian Walkway and Vehicular Traffic Interruptions 8/14/02 to 8/16/02 <u>Reason:</u> Contractor will excavate and install the new water line in the lawn area west of Hale Science Building. The traffic lane will be reduced to onelane and could experience minor delays during work activities and equipment crossings. Barricades and routing signs will be in place. The parking spaces west of the Hale will be out of service. The service drive to Hale will be kept open and in service. See the attached work activity sketch work area description. Machinery noise may occur during the work activity. <u>Contact:</u> Gil Fike at 2-1431 for any questions. <u>Customer Impact:</u> This project will change the flow of pedestrian traffic For the period specified.		Attached Map
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	APPA Institute Design Project Management	Tool Kit
	• Consultant Instructions • Design Guidelines • Construction Standards • Planning Template • Service Levels • Outage Notices • Design Reviews	

	APPA Institute Design Project Management	Tool Kit
	<u>Design Reviews</u> Aesthetics Systems Concepts Maintainability Value Engineering Budget Schedule Approvals	Schematic Design "Orifice Building" 

	Review Reminders for the Client
	Program Plan Review: 1. Are client needs identified and met? 2. Is this affordable? 3. Will the schedule allow the facility to be delivered on a timely basis? 4. Have others in the department(s) or college reviewed this as needed? 5. Is the plan convincing for reviewers (up through CCHE)? Schematic Design Review: 1. Does the layout work? 2. Are aesthetics OK? 3. Is it in budget? 4. Are systems (e.g., heating / cooling) meeting user needs? 5. Have others in the department(s) or college reviewed this as needed?

	APPA Institute Design Project Management	Plan Reviews
• Plan Review Coordinator • Part time retiree • Email request for plan review • Log the request • Establish due date • Check for required information • Reviewers log-in each morning to check for new notices • Plan review room w/30" HD monitor (all electronic) • PRC checks deadlines • Emails comments to PM's • 3-5 day turnaround		<i><u>Current Process</u></i> 

	APPA Institute Design Project Management	Tool Kit
• Consultant Instructions • Design Guidelines • Construction Standards • Planning Template • Service Levels • Outage Notices • Design Reviews • Project Checklists		

 Facilities Management University of Colorado at Boulder	Department of Facilities Management Office of Planning, Design & Construction 1540 30th Street, UCB 453, Boulder, Colorado 80309-0453 Phone: (303) 492-3311 FAX: (303) 492-4082 Project Task Checklist ☐ Client initiates Work Order. ☐ Assistant Director receives Work Order from Facilities Management (FM) scheduling system. ☐ The Project Manager (PM) receives a file folder from Administrative Assistant. Include a Work Order Information Sheet, Work Order Questionnaire and Warranty Report. ☐ PM meets with Client to establish the scope of the project. a. PM also talks with them about the recharge policy as referenced in the FM, Design and Construction website. (fm.Colorado.EDU/recharge_policy.html) ☐ The Work Order Questionnaire is distributed by PM to Facilities Management and other University Agencies for review. 2 weeks allowed for review. ☐ Environmental Site Assessment Report is done by Environmental Health and Safety (EH & S). 2
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	APPA Institute Design Project Management	Tool Kit
• Consultant Instructions • Design Guidelines • Construction Standards • Planning Template • Service Levels • Outage Notices • Design Reviews • Project Checklists • Feedback & Evaluations		

 Facilities Management University of Colorado at Boulder Department of Facilities Management Office of Planning, Design & Construction 1540 30 th Street, UCB 453, Boulder, Colorado 80309-0453 Phone: (303) 492-5511 FAX: (303) 492-4082 <u>CONTRACTOR EVALUATION FORM</u> CONTRACTOR: _____ CONTACT PERSON: _____ PHONE #: _____ As part of our ongoing commitment to provide better service to our customers, we need to insure that the services we purchase are of the best quality possible and that they are performed in a timely and professional manner. Please <u>describe your experiences with the contractor</u> named on this form (both positive and negative). The contractor may be given the opportunity to respond. Describe fully the experience (including dates and any documentation you might have): _____	
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 Facilities Management University of Colorado at Boulder Department of Facilities Management Office of Planning, Design & Construction 1540 30 th Street, UCB 453, Boulder, Colorado 80309-0453 Phone: (303) 492-5511 FAX: (303) 492-4082 (PROJECT TITLE) <u>Architect / Engineer Evaluation</u> FIRM'S NAME: _____ <u>INSTRUCTIONS:</u> • The performance of each A/E under contract to the University of Colorado at Boulder evaluated following the completion of the project. • The Office of Facilities Design and Construction (FD&C) shall prepare all evaluation forms. The A/E firm will be formally evaluated by the project team, including representatives from FD&C, Facilities Planning, Facilities Engineering & Utilities, Physical Plant Division, Facility User(s), and others, appropriate at the completion of each major project phase (preconstruction, construction, etc.).	
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Customer Satisfaction Survey

 **Facilities
Management**
University of Colorado at Boulder

**Department of Facilities Management
Office of Planning, Design & Construction**

1380 30th Street, UCB #15, Boulder, Colorado 80309-3045
Phone: (303) 442-5311
Fax: (303) 442-4062

Web site: <http://fm.Colorado.EDU/>

Dear CU Faculty/Staff/Member:

We are striving to improve the quality of our service and increasing customer satisfaction. To help us in doing this, please respond to each question as it is imperative that all answers reflect your experience with us.

Sincerely,


Steve Threms, AIA
Director, Office of Planning, Design & Construction

Name of Project: _____

Work Order: _____ Completion Date: _____ Project Manager: _____

Responder / Project Responsibility: _____

- How do you feel about the scheduling of the work to complete this project?**

☐ Work was scheduled appropriately in advance.

☐ Work(s) began w/out sufficient notice.

☐ Scheduling caused avoidable disruption.

☐ Does not apply.
- Was the work completed on a timely basis?**

☐ Response to work request was prompt and efficient.

Planning, Design & Construction Performance Survey

2 / 5

The questions on this page are related to department performance. The following page will focus on the Project Manager's performance.

5. How did Planning Design & Construction department perform?

	Unacceptable	Needs Improvement	Satisfactory	Very Good	Exceptional
Project staffed appropriately?	☐	☐	☐	☒	☐
PM assigned promptly?	☐	☐	☐	☐	☒
Supported project adequately?	☐	☐	☐	☐	☒
Responded in a timely manner?	☐	☐	☐	☒	☐
Other (please specify)					

Prev Next

	APPA Institute Design Project Management	Tool Kit
• Consultant Instructions • Design Guidelines • Construction Standards • Planning Template • Service Levels • Outage Notices • Design Reviews • Project Checklists • Feedback & Evaluations • Housing Special Conditions		

	University of Colorado at Boulder Department of Housing
<u>Special Contract Conditions for Construction Projects in Occupied Students Housing</u>	
<u>Purpose</u> These Special Contract Conditions are required because this project involves construction within or adjacent to student residences. As such, the Contractor, all workers, subcontractors, delivermen and anyone else coming on to the work site must be informed of the requirements to respect the students' privacy and right to the quiet enjoyment of their residence halls or apartments. The work must be completed in a manner that maintains the security of the residence halls or apartments, limits contact with the students, provides advance notice of any work that may adversely affect the residents, and limits communications about the project to those persons designated by the University.	
<u>General Rules</u> 1. Contractor is required to comply with the University of Colorado's Sexual Harassment Policy, copy attached hereto and incorporated herein. Contractor's personnel must adhere to the University of Colorado policy and conduct themselves in a manner that does not constitute sexual harassment (as defined in the policy) as a result of interacting with and around the University of Colorado faculty, staff and students. Contractor is also required to inform each subcontractor of the University's policy prohibiting sexual harassment. 2. No smoking in any residence hall or apartment building spaces. This includes living and dining spaces, restrooms, circulation areas, attics, mechanical rooms, basements and/or crawl spaces. Any smoking is to be done outside the building and far enough away that smoke cannot enter windows or ventilation system.	

	APPA Institute Design Project Management	Tool Kit
• Consultant Instructions • Design Guidelines • Construction Standards • Planning Template • Service Levels • Outage Notices • Design Reviews • Project Checklists • Feedback & Evaluations • Housing Special Conditions • Double Time / Fast Track		

 **FAST TRACK**

June 7, 2006

TO: FM Project Managers

FROM: Bill Ward, Assistant Director; Facilities Management Design & Construction
Moe Tabrizi, Assistant Director; Facilities Management Engineering

SUBJECT: Double-time or Fast Track Projects

Introduction: Facilities Management leadership continues to receive campus client/customer feedback regarding time interval (length of time) to complete remodeling or new construction projects on campus. It is generally accepted that some delays are related to incomplete planning or incomplete input for required reviews and budget availability. However, due to the serial nature of our planning, design and construction process, adding all appropriate steps without unexpected delays would still amount to a long lead time. Many projects are not very time sensitive. However, there are a small number of projects that are very time sensitive AND there is only a small window of time that they can be implemented on campus without resulting great impact on the campus teaching and learning mission.

Proposed Solution: For a very small percent of the given client's projects and based on prior agreement with PD&C leadership, all known and published project planning, design, project reviews and implementation intervals would be shortened by a goal of 50% equally for all functions. Of course, this solution requires better than normal, more complete input from the client and more complete paperwork as input to the double-

	APPA Institute Design Project Management	Tool Kit
• Consultant Instructions • Design Guidelines • Construction Standards • Planning Template • Service Levels • Outage Notices • Design Reviews • Project Checklists • Feedback & Evaluations • Housing Special Conditions • Double Time / Fast Track • Close Out Checklist • Key Party		



**You are cordially invited to
a key party--**
Project Management & Construction
will officially turn over the

Turman Residence Hall

to Facilities Management
Monday, August 13, 2007, 1:00 pm
Turman Residence Hall
First Floor Lobby
640 Means Drive








Let the Party Begin

Signing the Close-out Documents



	APPA Institute Design Project Management	Tool Kit
	• Consultant Instructions • Design Guidelines • Construction Standards • Planning Template • Service Levels • Outage Notices • Design Reviews • Project Checklists • Feedback & Evaluations • Housing Special Conditions • Double Time / Fast Track • Close Out Checklist • Key Party • Lessons Learned	

 Lessons Learned - Math and Science Center January 9, 2003 1. More user group education needed– at the end of the building process, I knew the things I needed to know at the start of the process! Here are the types of user education/support that would have been useful during the building process: A. General introduction to the stages of the building process (programming, schematic design, design development, construction, etc). The introduction should include: role of user group at each stage (including the importance of user's comments on plans); level of detail of the plans that emerges at each stage; processes and procedures for making changes to the plans; and the role of LEED in the design process. B. Although trips to other institutions may be useful, we should institute an on-campus training program for new user groups. We have some great new facilities on campus and we should use them effectively. For example, a tour of the Mathematics and Science Center (M&SC) could illustrate: a. General departmental layout	
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	• Consultant Instructions • Design Guidelines • Construction Standards • Planning Template • Service Levels • Outage Notices • Design Reviews • Project Checklists • Feedback & Evaluations • Housing Special Conditions • Double Time / Fast Track • Close-Out Checklist • Key Party • Lessons Learned • Move in Brochure	



University of Colorado @Boulder
Facilities Planning, Design & Construction
Small Projects Ideas

In an effort to improve the overall delivery of small projects to our campus customers, the PD&C division is proposing a partnership with the College of Engineering and Applied Sciences to initiate a pilot program for small projects (under \$500k).

Some of the ideas are as follows:

1. We (Facman) should re-route small project requests from the Service Desk or web-based system to a "PM assistant". *(This refers more to a function than a position. Since we are under severe budgetary constraints, we want to find ways to help the project managers be efficient and cost effective.)* The PM assistant can make a quick assessment of the scope and expedite the assignment of the project to the appropriate project manager. PD&C should get the work order requests first rather than the service desk trying to guess what the scope may be. (Sometimes work orders are misdirected to the wrong shop due to the poor description work that is submitted, resulting in a delayed start.)
2. PD&C will initiate a "one-stop shopping" model for project requests to streamline the normal process. The designated projects liaison for Engineering (Skip Wichart) should have one individual to deal with when initiating a project. If Skip initiates all Engineering projects and has one contact to work with in PD&C, then the initiation of a project can be much simpler and quicker.
3. Initiate a project monitoring system for projects that measures:
 - ◊ Response time,
 - ◊ Schedule Performance, and
 - ◊ Quality.

	APPA Institute Design Project Management	Tool Kit
- Small Project Ideas - Warranty Period "At the completion of a project, we structure our 1 year warranty period to include the Facilities management team having direct contact with the GC's superintendent to address any issues that arise. This removes having the project manager as a middle person, and the correction of problems occur in a more timely manner." Tom Clow University of New England		

	APPA Institute Design Project Management	Tool Kit
- Small Project Ideas - Warranty Period - Hurt Feelings Report		

NURTURING REPORT For use of this form to file a grievance for hurt feelings DATA REQUIRED BY THE PRIVACY ACT OF 1974			
AUTHORITY:		5 USC 301, Department Regulations, 10 USC 3013	
PRINCIPAL PURPOSE:		To assist whiners in documenting hurt feelings and to provide leaders with a list of a person who require counseling and sympathy.	
ROUTINE USES:		For subordinate leader development NW FM22-102. Leaders & whiners should use this form as	
DISCLOSURE:		Disclosure is voluntary, but repeated disclosure may result in a Walk to Wall Counseling	
PART I - ADMINISTRATIVE DATA			
A. WINNER'S NAME (Last, First, MI)	B. POSITION	C. SOCIAL SECURITY NUMBER	D. DATE OF REPORT
E. ORGANIZATION		F. NAME & TITLE OF THE PERSON FILLING OUT THIS FORM	
PART II - INCIDENT REPORT			
A. DATE FEELINGS WERE HURT	B. TIME OF HURT/INJURY	C. LOCATION OF HURTFUL INCIDENT	
D. WITNESSES OF HURT FEELINGS		E. NAME OF REAL MAN/WOMAN WHO HURT YOUR SENSITIVE FEELINGS	
F. POSITION		G. ORGANIZATION (if different from B above)	
E. INQUIRY (Mark all that apply)			
1. WHICH EAR WERE THE WORDS OF HURT/FASE SPOKEN INTO?		2. IS THERE PERMANENT FEELING DAMAGE?	
left right both		YES NO MAYBE	
3. DID YOU REQUIRE A "TISSUE" FOR TEARS?		4. HAS THIS RESULTED IN A TRAUMATIC BRAIN INJURY?	
YES NO MULTIPLE		YES NO MAYBE	
F. REASON FOR FEELING THIS REPORT (Mark all that apply)			
☐ I am thin skinned	☐ My boss needs to learn problems		☐ Two boys is not enough
☐ I am a wimp	☐ My feelings are easily hurt		☐ My hands should be in my pockets
☐ I have woman/man-like hormones	☐ I didn't sign up for this		☐ I was not offered a post brief
☐ I am a crybaby	☐ I was told I am not a hero		☐ Post brief
☐ I want my privacy	☐ This was either a top secret or a secret		☐ All of the above and more

	APPA Institute Design Project Management	Tool Kit
• Small Project Ideas • Warranty Period • Hurt Feelings Report • MSU Faculty Readiness Program		

Faculty Readiness Project
MICHIGAN STATE UNIVERSITY

ALIGNING EFFORTS AT MICHIGAN STATE

- In response to Bolder by Design imperatives of introducing research opportunities and advancing our culture of high performance:
 - Improve time frame of project completion for incoming faculty.
 - Align project expectations with appropriate delivery method.

Faculty Readiness Project
MICHIGAN STATE UNIVERSITY

HOW WE GOT ORGANIZED

- Dedicated FRP team selected.
- Met with different campus departments to promote early collaboration during recruitment phase for new faculty.
- Work with MSU Contract Administrator to develop an RFQ and select a sole source contractor for a 3-year contract.

Faculty Readiness Project
MICHIGAN STATE UNIVERSITY

HOW DOES THE FACULTY READINESS PROJECT (FRP) FIT?

IPF becomes involved as a **partner** in this recruitment process

Old Way

- Recruit
- Offer/Accept
- I'm Here
- Notify Facilities
- Design
- Construct
- Occupy

New Way

- Recruit
- Notify Facilities
- Offer/Accept
- Design
- I'm Here
- Construct
- Occupy

Faculty Readiness Project

MICHIGAN STATE UNIVERSITY

THE AH-HA MOMENT

- Department funded studies/preliminary designs help to define accurate scope and budget.
 - Can further expedite the renovations and project schedule.
- With FRP/IPF early involvement, the offer to the recruit can include the proper budget for the necessary renovations.
 - No time wasted waiting for additional funding.

NAME OF PROJECT	TOTAL COST	RESEARCHER	RESEARCHER
1. Lab Renovation	100,000	Dr. Smith	Dr. Smith
2. Office Renovation	50,000	Dr. Jones	Dr. Jones
3. Lab Renovation	75,000	Dr. Brown	Dr. Brown
4. Office Renovation	25,000	Dr. White	Dr. White
5. Lab Renovation	125,000	Dr. Green	Dr. Green
6. Office Renovation	75,000	Dr. Black	Dr. Black
7. Lab Renovation	100,000	Dr. Gray	Dr. Gray
8. Office Renovation	50,000	Dr. Blue	Dr. Blue
9. Lab Renovation	125,000	Dr. Yellow	Dr. Yellow
10. Office Renovation	75,000	Dr. Purple	Dr. Purple
11. Lab Renovation	100,000	Dr. Red	Dr. Red
12. Office Renovation	50,000	Dr. Orange	Dr. Orange
13. Lab Renovation	75,000	Dr. Pink	Dr. Pink
14. Office Renovation	25,000	Dr. Brown	Dr. Brown
15. Lab Renovation	125,000	Dr. White	Dr. White
16. Office Renovation	75,000	Dr. Green	Dr. Green
17. Lab Renovation	100,000	Dr. Black	Dr. Black
18. Office Renovation	50,000	Dr. Gray	Dr. Gray
19. Lab Renovation	75,000	Dr. Blue	Dr. Blue
20. Office Renovation	25,000	Dr. Yellow	Dr. Yellow
21. Lab Renovation	125,000	Dr. Purple	Dr. Purple
22. Office Renovation	75,000	Dr. Red	Dr. Red
23. Lab Renovation	100,000	Dr. Orange	Dr. Orange
24. Office Renovation	50,000	Dr. Pink	Dr. Pink
25. Lab Renovation	75,000	Dr. Brown	Dr. Brown
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30. Office Renovation	50,000	Dr. Blue	Dr. Blue
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40. Office Renovation	75,000	Dr. Gray	Dr. Gray
41. Lab Renovation	100,000	Dr. Blue	Dr. Blue
42. Office Renovation	50,000	Dr. Yellow	Dr. Yellow
43. Lab Renovation	75,000	Dr. Purple	Dr. Purple
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52. Office Renovation	75,000	Dr. Blue	Dr. Blue
53. Lab Renovation	100,000	Dr. Yellow	Dr. Yellow
54. Office Renovation	50,000	Dr. Purple	Dr. Purple
55. Lab Renovation	75,000	Dr. Red	Dr. Red
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74. Office Renovation	25,000	Dr. Blue	Dr. Blue
75. Lab Renovation	125,000	Dr. Yellow	Dr. Yellow
76. Office Renovation	75,000	Dr. Purple	Dr. Purple
77. Lab Renovation	100,000	Dr. Red	Dr. Red
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85. Lab Renovation	75,000	Dr. Blue	Dr. Blue
86. Office Renovation	25,000	Dr. Yellow	Dr. Yellow
87. Lab Renovation	125,000	Dr. Purple	Dr. Purple
88. Office Renovation	75,000	Dr. Red	Dr. Red
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95. Lab Renovation	100,000	Dr. Gray	Dr. Gray
96. Office Renovation	50,000	Dr. Blue	Dr. Blue
97. Lab Renovation	75,000	Dr. Yellow	Dr. Yellow
98. Office Renovation	25,000	Dr. Purple	Dr. Purple
99. Lab Renovation	125,000	Dr. Red	Dr. Red
100. Office Renovation	75,000	Dr. Orange	Dr. Orange

Project	Renovation Costs	Lab	Office
1. Lab Renovation	100,000	379,138	11,870
2. Office Renovation	50,000		
3. Lab Renovation	75,000		
4. Office Renovation	25,000		
5. Lab Renovation	125,000		
6. Office Renovation	75,000		
7. Lab Renovation	100,000		
8. Office Renovation	50,000		
9. Lab Renovation	75,000		
10. Office Renovation	25,000		
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87. Lab Renovation	75,000		
88. Office Renovation	25,000		
89. Lab Renovation	125,000		
90. Office Renovation	75,000		
91. Lab Renovation	100,000		
92. Office Renovation	50,000		
93. Lab Renovation	75,000		
94. Office Renovation	25,000		
95. Lab Renovation	125,000		
96. Office Renovation	75,000		
97. Lab Renovation	100,000		
98. Office Renovation	50,000		
99. Lab Renovation	75,000		
100. Office Renovation	25,000		

Faculty Readiness Project

MICHIGAN STATE UNIVERSITY

WHAT WE'VE DONE

- 2014: 5 projects occupied; \$368,600
- 2015: 15 projects occupied; \$1,783,900
- 2016: 8 projects occupied; \$2,924,900
- 2017: 18 projects occupied; \$2,970,646
- 2018: 10 projects occupied; \$3,033,300

FACULTY READINESS PROJECTS											
Year	Project	Occupied	Cost	Year	Project	Occupied	Cost	Year	Project	Occupied	Cost
2014	1. Lab Renovation	1	368,600	2015	1. Lab Renovation	1	1,783,900	2016	1. Lab Renovation	1	2,924,900
2014	2. Office Renovation	1	368,600	2015	2. Office Renovation	1	1,783,900	2016	2. Office Renovation	1	2,924,900
2014	3. Lab Renovation	1	368,600	2015	3. Lab Renovation	1	1,783,900	2016	3. Lab Renovation	1	2,924,900
2014	4. Office Renovation	1	368,600	2015	4. Office Renovation	1	1,783,900	2016	4. Office Renovation	1	2,924,900
2014	5. Lab Renovation	1	368,600	2015	5. Lab Renovation	1	1,783,900	2016	5. Lab Renovation	1	2,924,900
2015	6. Office Renovation	1	1,783,900	2016	6. Office Renovation	1	2,924,900	2017	6. Office Renovation	1	2,970,646
2015	7. Lab Renovation	1	1,783,900	2017	7. Lab Renovation	1	2,970,646	2018	7. Lab Renovation	1	3,033,300
2015	8. Office Renovation	1	1,783,900	2018	8. Office Renovation	1	3,033,300				
2015	9. Lab Renovation	1	1,783,900								
2015	10. Office Renovation	1	1,783,900								
2015	11. Lab Renovation	1	1,783,900								
2015	12. Office Renovation	1	1,783,900								
2015	13. Lab Renovation	1	1,783,900								
2015	14. Office Renovation	1	1,783,900								
2015	15. Lab Renovation	1	1,783,900								
2016	16. Office Renovation	1	2,924,900								
2016	17. Lab Renovation	1	2,924,900								
2016	18. Office Renovation	1	2,924,900								
2016	19. Lab Renovation	1	2,924,900								
2016	20. Office Renovation	1	2,924,900								
2016	21. Lab Renovation	1	2,924,900								
2016	22. Office Renovation	1	2,924,900								
2016	23. Lab Renovation	1	2,924,900								
2016	24. Office Renovation	1	2,924,900								
2016	25. Lab Renovation	1	2,924,900								
2016	26. Office Renovation	1	2,924,900								
2016	27. Lab Renovation	1	2,924,900								
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2016	41. Lab Renovation	1	2,924,900								
2016	42. Office Renovation	1	2,924,900								
2016	43. Lab Renovation	1	2,924,900								
2016	44. Office Renovation	1	2,924,900								
2016	45. Lab Renovation	1	2,924,900								
2016	46. Office Renovation	1	2,924,900								
2016	47. Lab Renovation	1	2,924,900								
2016	48. Office Renovation	1	2,924,900								
2016	49. Lab Renovation	1	2,924,900								









PLANNING




Planning and Project Funding

The programmatic needs of the project often the feasibility of academic space requests. These may include functional requirements, space characteristics, room lists, square footage needs, building efficiency data, adjacency requirements and occupancy projections.

- The PCA will include a review of nonprogrammatic costs. These costs may include applicable building costs, safety, barrier free access, security and fire protection.
- A review of energy planning, conservation goals and sustainability measures will be done on design items such as recycling and water conservation, environmental impacts on zoning, infrastructure capacity, just-in-time maintenance needs, hazardous-material remediation, and site and landscape needs.

Additional effects on traffic and parking will be examined to ensure compliance with the university's master planning policies and infrastructure strategy.

What You Can Expect

- We promptly respond when we receive your request.
- We thoroughly review existing conditions affecting the scope of your project.
- We bring proven expertise in applicable codes and university policies affecting the scope of your project.
- We are your trusted advisor to help you achieve your facility objectives.

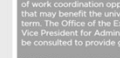
What IPF Expects

- You initiate a service-request form to begin the process using the online, service-request form.
- You provide sufficient information to clearly explain needs.
- You collaborate with us on potential solutions and options.
- You obtain required authorization should the project proceed.

Developing the PCA requires investigating the existing facility. This includes review of the capital renewal/maintenance list as well as minor demolition for encroachments.

The PCA also includes identification of work coordination opportunities that may benefit the university long term. The Office of the Executive Vice President for Administration will be consulted to provide guidance.

The PCA is expressed as an initial "order of magnitude" range and is based on anticipated costs at the time the project is planned.

THE TEAM

THE PROJECT

TECHNICAL SUPPORT

- Utilities
- Building Services
- Campus Services
- Planning, Design and Construction
- Learning and Environment
- Communications
- Support Services
- IT Services
- Environmental Health and Safety
- H&U Police

PROFESSIONAL SUPPORT

- Architecture
- Engineering
- Landscape Architecture
- Project Management
- Interior Design
- Contracting
- Accounting

PLANNING PARTNERS

- Resource and Regulatory Services
- Resource Center for Persons with Disabilities
- Campus Infrastructure Planning Work Group
- Off-Campus Partners and Municipalities
- Environmental Health and Safety
- Office of Planning and Budgets
- University Physicians Office
- H&U Police
- IT Services

PROJECT TEAM

- RFP Design Manager
- RFP Project Manager
- Customer Representative
- Capital Project Accounting
- Professional Consultant
- Contractor

[illegible]

The design phase begins when IPF receives authorization to plan for a renovation or new construction project.

This phase of a major project typically costs \$5 million and greater to include four distinct milestones: program development, schematic design, design development, and construction documents.

1. Program development/verification (feasibility)

This is a written description of the requirement for the project, developed by the project team in collaboration with you, the customer. This document includes project objectives and detailed information regarding all affected spaces, including size, relationships and technical aspects. The following approvals are required to move the project forward:

- Executive Stakeholder Review:** The Campus Infrastructure Planning Work Group (CIPWPG) reviews major projects for consistency with the Campus Master Plan. CIPWPG also advises senior leadership on the project and recommendations are shared with HESU Board of Trustees (BOT) prior to BOT (step 3) project approval.
- Project Approval:** BOT (step 3) authorizes planning, which generally results in continuing development of project design and design features, including floor plans, adjacencies, materials, building massing, character, site and relationship to its surroundings.

2. Schematic design

The schematic design determines the project's general design features, including floor plans, adjacencies, materials, building massing, character, site and relationship to its surroundings.

3. Design development

This milestone defines the project to a greater level of detail, resulting in a plan, coordinated drawings, specifications, systems and materials. The following approvals are required:

- Review:** Facilities Focus: To inform campus community about the project and gather feedback.
- Review:** CIPWPG (step 2) reviews program development, schematic design, and makes recommendation to proceed to BOT.
- Project Approval:** BOT (step 3) gives authorization to proceed, commits to a scope, schedule and budget.

4. Construction documents

This includes drawings and specifications for all project components. The objectives are to produce bid documents, submit bids from construction contractors and obtain all necessary permits. The following is required for general contractor approval:

- MSU Administration:** MSU's Board of Trustees (BOT) has general supervision over the university and its funds. For projects having a budget of \$5 million and above, the MSU Board of Trustees (BOT) must approve the project's design and the project's delivery. BOT approvals are required at two points during the project's delivery.

5. Construction

Prior to BOT approval, projects are reviewed by key MSU leadership and may require a presentation. All funding plans are approved by the Office of Planning and Budgets, the Vice President for Finance, and the Executive Vice President for Administration.

Project Planning Partners



The Project Planning Partners List is a resource for communicating with various individuals on and off campus involved in a capital project.

IT Services
This department reviews projects involving telecommunications, audio/visual, and infrastructure which includes networking, Wi-Fi.

MSU Police
This department reviews projects affecting fire/life safety, parking, roads, traffic design and building security systems.

Off-Campus Partners
Various off-campus partners may provide input and review involving roads, or soil erosion and sedimentation, including the city of East Lansing, the city of Lansing, the state of Michigan and Ingham County.

Residential and Hospitality Services (RHS)
Various departments in RHS may provide input and review, including the planning and projects office, the space coordination and review committee, information services and Culinary Services.

Resource Center for Persons with Disabilities (RCPD)
Reviews projects affecting accessibility to maximize the ability and opportunity for full participation by persons with disabilities.

University Physician's Office (UPO)
Reviews projects involving food service and swimming pool facilities.

Campus Infrastructure Planning Work Group (CIPWG)
In compliance with the Campus Master Plan, reviews projects that modify the campus landscape character, affect campus infrastructure or require a zoning variance prior to Board of Trustee actions.

Environmental Health and Safety (EHS)
Reviews projects involving hazardous-materials compliance, laboratory equipment, ventilation systems, and environmental waste management.

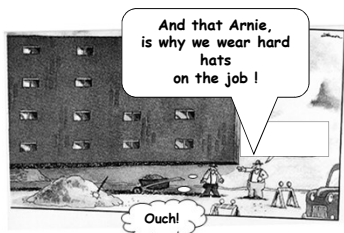
Infrastructure Planning and Facilities (IPF)
Various departments at IPF may provide input and review, including building performance services, capital project accounting, custodial, landscape services, maintenance services, power and water, project services, safety, surplus and recycling, support services, transportation services, and communications.

9

	Project Management
<u>Part 4 -Managing The Process</u> • Project Management • Project Managers • Project Budgeting 	

	APPA Institute Design Project Management		Project Management
<u>What Is It ?</u> <i>“The balancing of design, schedule and budget to meet the clients expectations”</i>  Project Manager			

A cartoon illustration of a man in a suit, looking extremely stressed and overwhelmed, sitting at a desk. He is surrounded by a chaotic explosion of various business and accounting terms and documents. The terms include: 'Funchlist', 'The long', 'lose out', 'AND', 'CP', 'IBM', 'Hag long', 'inspections', 'concrete', 'Time sheets', 'Asphalt', 'Change Order', 'Project order', 'cease if dead', 'order-order', 'schedule', 'Order after', 'oh-no!', 'claims certificate', 'interplants', 'stolte 93'. There are also drawings of a clock, a lightbulb, a calendar, and a computer monitor on the desk.

	APPA Institute Design Project Management	Project Management
<u>Who Are They?</u> • Design Team • Owner • Contractor 		

	APPA Institute Design Project Management	Traits of the Owner's PM
<u>Traits of a Good PM</u>  • Organized • Broad Based • Good Communicator (listener) • Proactive • Leads by Example • Consistent • Follows Through • Holds People Accountable • Delegates Well • Patient & Wise 		

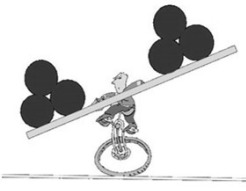
	APPA Institute Design Project Management	PM Pitfalls
<u>PM Pitfalls</u>  • Delegation Errors • No One Can do Better • I Can Do It Faster • I Have to Fix it Anyway • It Takes too Long to Explain • I'll be Disappointed • I'm Not in Control • It Won't be Perfect 		

	APPA Institute Design Project Management	PM Pitfalls
<u>PM Pitfalls</u> • Delegation Errors • Micro vs. Macro • Analysis vs. Synthesis • SOP vs. Flexibility • PM vs. PM • Image vs. Substance Take this job and shove it!! 		

Failure is not a way of life, it's a moment in time



Get over it

	APPA Institute Design Project Management	PM Tips
<u>PM Tips</u> From the mouth of babe's... 		

From: Steven C. Thumalt

To: Steven C. Thumalt

Subject: Customer Service Best Practices

Date: Sunday, June 02, 2013 1:57:46 PM

Paul,

First, thank you for this nice email. I don't know that I have done anything special here, I have just tried to follow basic project management principals. Here are a few examples:

- **Clear, constant communication** – this has involved face to face communication and phone calls rather than just emails. I also did send the Client emails summarizing the project progress made every few days. He would then forward these onto his superior
- **Follow Through** – I try to say what I will do and do what I say. If I promise something to the Client, I try hard to follow up on my promise.
- **Lead by example** – When challenged by the Client to have a Change Order free Tower portion of the project, I asked the consultant to meet me in the space with his 100% documents. We discovered that there was a lot lacking in his drawings. Taking 100% drawings out to the field and reviewing them in the space to be renovated was something that I used to do when I was working as an architect on Campus.
- **Positive Attitude** – Although the Client can be challenging, I have enjoyed working with him and I try to be positive about my work on this project.
- **Tell it like it is** – I am not afraid to give my opinion to the Client. When I think he is making an error, I tell him. He decided to leave some of the V&T flooring rather than abate it and I told him I thought that was a mistake. We are going to have to have some tough discussions in the Tower portion of the project. From a building envelope view point, this space is a 60's mess. We shouldn't spend \$500K on the Conference Center if people are going to be too hot, or too cold in the space.

Although this project is far from over, hopefully we are off on the right foot with the Client. I hope this is what you were looking for.

Peter



APPA Institute
Design Project Management

PM Tips

Managing Client Relations

Leadership	Management
1. Know your client personally	1. Keep your files organized
2. Understand your client	2. Respond to requests promptly
3. Be a partner	3. Meet your commitments
4. Foster Trust	4. Issue regular progress reports
5. Demonstrate credibility	5. Be persistent when you need input
6. Anticipate – don't react	

Most important – No Surprises!



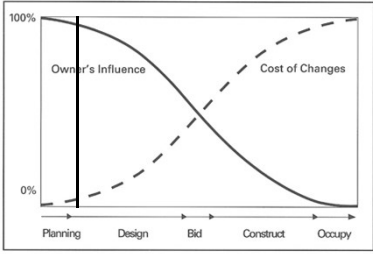
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Design Project Management

Managing the Project

Managing the Project

Develop Project Mgt. Plan (PMP)

- The 90/10 Rule

	APPA Institute Design Project Management	Keys to Success
The 90/10 Rule 		

	APPA Institute Design Project Management	Keys to Success
• PMP (Understand Project and Desired Outcomes) • Vision/Goals/Objectives / Critical Factors for Success • Communication Plan • Scope • Schedule • Financial Plan • Quality Control Process • Change Management Process • Involve Key Stakeholders • Identify Constraints • Assemble Team / Empower the Team • Resolve Conflicts • Encourage Risk Taking		

	APPA Institute Design Project Management	Budgeting
<u>Project Budgeting</u> • Cost Management Principles • Realistic Expectations • Cost Data • Scope Control 		

