

Physical Plant Project Management Workbook



Purpose:

This Project Management Workbook is intended to be used by Brandon University Physical Plant employees to support the campus community and determine how projects and major repairs or replacements should be completed. Use this document as an outline of all of the required steps of each project stage. All project tendering is to compliment the current Brandon University Purchasing and Accounts Payable Manual.

What is a Project?

Brandon University Physical Plant's standard project definition is:

"A temporary work task or activity assigned to Physical Plant, taking place within a defined timeframe, that when completed creates a unique product, service or result."

Work that does not meet the criteria of the above has been defined as "repair and replacement" work. Repair and replacement work may follow similar procedures as a project.

5 Step Project Management Processes:

Brandon University Physical Plant recognizes a standardized five-step Project Management Lifecycle framework:

1. Initiate
2. Plan & Design
3. Execute
4. Monitor & Control
5. Close-out

1. Initiate

Project initiation checklist:

- Do I know who this project will impact?
- Do I know who determines success?
- Have I clarified expectations?
- Have I created a shared understanding of the project's outcomes?
- Have I identified and communicated with all of the project stakeholders?

The objective of this step is to authorize the project by ensuring all project stakeholders are identified and to clarify a shared and measurable set of expectations with those stakeholders.

2. Plan and Design

To enable smart decision making, a detailed roadmap must be provided. This will include any required documentation (drawings, specifications, finish schedules) to fully describe the proposed work (construction).

A cohesive, high-level **Project Management Plan** or **Project Charter** is developed to define the following key items:

- A. Scope – define purpose or main goal and critical success factors (see below)
- B. Sponsors, Stakeholders, Subject matter experts & Resources – decisions, authority, need, connections and energy (who is active, accountable, consulted and informed)
- C. Schedule of work – tasks, who is responsible for each task, duration (time required), sequence (priority), monitoring/control (meetings, inspections, sign off of tasks)
- D. Costs, Budget & Procurement – estimates, reporting, variances, change processes
- E. Communication – plan and track
- F. Risks & Opportunities – define and provide responses
- G. Quality – project standards, metrics, change processes

A **Project Scope Statement** will include:

- Project purpose and description - client needs or desires, assumptions and exclusions
- Deliverables, key milestones and events
- Approvals

Tools/considerations to use in developing scope:

- Historical information, maps, reports, benchmarking, drawings, specifications, site tours
- Observations, interviews, surveys, focus groups, brainstorming, questionnaires
- Prototypes, problem and issue logs, process flows
- Legislative and safety requirements
- Financial considerations and options

3. Execute

A key to project execution is to engage people through consistent and shared accountability. Team accountability and trust can be created through various communication means, such as (but not limited to):

- Start-up meeting: The intent of a start-up meeting is to provide all stakeholders with a clear and shared understanding of the project prior to starting the work.
- Site orientation: An orientation should be performed prior to the start of any project, and could be documented with an On-site Orientation Checklist.
- Weekly status reviews or progress update meetings: Depending on project size, these regular meetings can be on-site, through online or conference calls, or via email updates. Meetings should share relevant project information and could provide a consistent metric to measure progress visibly for the team.

4. Monitor & Control

Project monitoring and control will ensure that the project goals are being served and that the project plan is successful in meeting the purpose. Monitoring and controls can be achieved through various reporting, data management or inspection methods (i.e., financial variances, checklists, timelines, etc.). Changes to the project plan will inevitably occur, and subsequent impacts including risks and opportunities must be managed properly. Scope creep is the tendency of a project to grow beyond the authorized scope, is often the result of a poor scope statement or from poor control. It is recommended that any scope changes be documented and a review of impacts on schedule and budget be completed.

5. Close-Out

Project completion involves a proper close-out to evaluate and confirm fulfillment of the project scope. A proper project close-out should include:

- Training for any new systems or processes and documentation.
- A final inspection with deficiencies noted for future correction.
- A financial reconciliation of project costs, with any noted outstanding items.
- A project sign-off completion form.
- A Lessons Learned meeting and document to assist with identifying any gaps and successes. This can be a beneficial tool for future projects.
- A final status report to all stakeholders, with an opportunity for feedback or evaluation.
- Proper recording and filing of all project documentation, including the project plan documents, manuals and operating instructions, drawings and specifications, test results, training documents and warranties.

Finally, a project celebration to recognize successes could signify the end the project.

We look forward to working with you on your next project!