Project Management - What is it?

- Project Management, Business & Financial Affairs, is responsible for the development and implementation of SDSU Minor Capital Outlay (\(\leq 634,000\)) and Capital Renewal (no $ limit) Construction Projects.

- The Project Management office is responsible for oversight of all facets of a project’s life-cycle, from the scoping, design and budgeting phases through agency review, permitting, bidding, construction, inspection, and final close-out documentation.

- Project Management oversight ensures that a construction project not only fits a given budget, but that it also fits a given schedule and is constructed according to all viable safety and code requirements while providing quality assurance for the client.

- When does the Project Management office need to be involved? Good question. Typically, PM is required when a request for a “renovation” or “remodel” is made which changes use, modifies existing space (i.e., builds or removes walls, adds or deletes doors, etc.), or otherwise requires State Fire Marshal review and hence Inspector of Record services to ensure code enforcement. (NOT paint & carpet - these are “refresh” items and do not require PM services - Facilities Services will fulfill these requests without engaging PM oversight.)

- The following presentation illustrates a typical project timeline, highlights several distinct phases associated with a project request, and details the necessary steps performed by Project Management within each phase. Requests can be submitted throughout the calendar year; this presentation spotlights a request submitted on the last December working day prior to the campus’ Winter Break, for a project expected to be completed & ready for use by the start of the following fall semester.
Overview

SDSU, Project Mgmt

PM Process
Phase 1 - ROM
• Visit Client
• Scope Project
• Obtain CDBO Direction
• Prepare Project Estimate
• Submit to Dept. for Funding

PM Process
Phase 2 - D & D
• Develop CDs
• Do Agency Reviews
• Re-scope as Needed
• Re-estimate as Needed
• Submit to Dept. for Funding

PM Process
Phase 3 - Implementation
• Finalize CDs; Obtain Permit
• Bid & Award (if contract)
• Establish Support Contracts
• Construct & Inspect
• Close-out: Final; Bill; File NOC

Department Process - I
• Department Reviews Estimate
• Department Obtains FAH Approval
• Forward Signed Approval to PM
• PM initiates Phase 2

Department Process - II
• Department Reviews Estimate
• Department Obtains FAH Approval
• Forward Signed Approval to PM
• PM initiates Phase 3

Glossary of Acronyms:
• PM - Project Management Office
• ROM - Rough Order of Magnitude
• CDBO - Campus Deputy Building Official
• D & D - Design & Development
• CDs - Construction Documents
• NOC - Notice of Completion
• FAH - Fiscal Authorization Hierarchy

Initiate Work Request to PM

Work Request Closed
Sdsu, project management [project process]

Submission timeline

Jan. - Dec. (of prior year)

NOTE

Work requests for projects which need to be completed and ready for use by the next year’s fall semester must be submitted during the current calendar year, and no later than the last working day of December prior to campus’ Winter Break closure.

Typical process timeline for a work request submitted by december of year prior to actual construction work.

Jan. (of next year)

Phase I - Rom

[Rough order of magnitude]

Development of project scope and rough cost estimate

Feb.

Dept. Process I

Dept. approval for documents [plans and specifications]

Feb. - Apr.

Phase II - D&D

[Design & Development]

Development of project documents for agency review and construction

Apr.

Dept. Process II

Dept. approval for implementation [construction and inspection services]

May - Aug.

Phase III - Implementation

Permits;

Contracts;

Construction;

Inspection;

Final documentation;

Billing
Work Request Submission

- The Work Request submission step is the be-all and end-all in initiating any form of PM involvement.

- Departments are to determine the general scope of construction (renovation/remodel) needed, as well as funding sources for total funding pool, and to submit a Work Request to Project Management.

- Please Note: Primarily due to CSU & State Agency design and code review requirements, from an initial request to turn-key completion (Agency-Approved Occupancy), even simple renovation projects typically require a full eight (8) months to complete. THEREFORE, the December pre-Winter Break closure date is the cut-off for project requests that are expected to be completed by the beginning of the following year’s fall semester.

- Please Note: Project Management serves the entire campus community, including auxiliaries. It is important to submit a work request as soon as possible. The earlier the submission, the sooner the project request can be reviewed by Project Management to begin the process.
During this phase a site meeting will be scheduled with the client to define/refine the scope of the project.

Based on the delineated scope, the Project Management office will develop a rough cost estimate useful as a Rough Order of Magnitude (ROM) for anticipated total project costs (design - construction - administration).

This estimate, based on a scope-specific cost per square foot analysis, is good for approximately +/- 75% accuracy of total project costs.

The Project Management office will also obtain direction from the Campus Deputy Building Official (CDBO) regarding the appropriate level of official agency plan review.

Once completed, the ROM is sent to the department for funding approval.
• Project Management is the administration hub between clients and constructors and is responsible for obtaining plan approval from the California State Fire Marshal (CSFM) and construction permits from the Campus Deputy Building Official (CDBO).

• Once a Rough Order of Magnitude (ROM) has been determined, it is formalized into a project estimate by Project Management and sent to the department for funding approval.
  • Estimates for Academic Affairs that exceed $20,000 will also be routed through the Associate Vice President of Academic Affairs for approval.

• Once the formal project estimate [ROM] has been received from PM, the client/department will have two weeks to approve funding for design & development. If approval is not received within this timeframe, minimally, the construction project timeline will be extended to reflect the delay; potentially the project will be flagged for resubmission or dismissed, and the Work Request would then be canceled.
Upon approval of the ROM [Rough Order of Magnitude], and the level of financial/scope commitment of the client/department, the project design will go into either:

- A) Schematic Development (more exploratory in nature); or
- B) Construction Document [CD set] Development

Schematics, upon completion, are re-estimated (+/-85% accuracy) and must be re-approved prior to creation of CDs (typ. 3+ wks. for smaller projects).

CDs will go through both department review and Agency Review for multiple levels of compliance (this process can be anywhere from 4 to 12+ weeks depending on project complexity and required agency reviews).

CDs are then re-estimated (+/- 95% accuracy, dependent on anything unforeseen), and a revised/updated Project Estimate is sent for department’s re-approval.
Department Process - II

- The new estimate is sent once again to the department for approval (NOTE: Approval must be done by the individual on the Fiscal Authorization Hierarchy (FAH) for the account string originally provided).

- The same 2-week period for approval is initiated (note: quick approvals during Department Processes I & II can shave 2+ weeks off the “Project Schedule - Typical Timeline” -- shown on ending PPT slide).

- Upon approval, Project Management initiates Phase III.
Phase III / Implementation

Step 6

• Upon approval of the Construction Document (CD set) Project Budget Estimate, Project Management initiates an Implementation Phase:
  • Finalize CDs (e.g., adjustments to scope as required by State Agencies)
  • Obtain Permits

• Bid & Award (if Contract)
  • Establish support contracts as necessary

• Construct & Inspect (1.5 - 3.5 months -- typically, depending on scope)

• Close-out:
  • Final [Punch-lists, Commissioning, As-Built Documentation, Operation & Maintenance Manuals, etc.]
  • Bill Department for Total Project Cost [Billings will be based on Actuals]
  • File N.O.C. [Notice Of Completion filed w/County Recorder’s Office]
Process Summary

- Work Requests can be submitted throughout the calendar year. For remodel/renovation projects that need to be completed by the beginning of the next year’s fall semester, Work Requests from departments must be submitted [1] during the current year, and no later than the last working day prior to the campus’ Winter Break, in order for any construction to commence.

- Work Requests will [2] be processed in order of submission. Site visits will be scheduled, full project scopes determined, and “Rough Order of Magnitude” [ROM] project estimates provided. ROM estimates will [3] be submitted to the department for funding approval.

- Upon departmental approval of a ROM, a project will [4] go into either a Schematic Phase (which is more developmental/exploratory in nature) or straight to the Construction Documentation Phase in which hard plans are developed and submitted for agency review with the full intent of construction implementation.

- After either the schematic set or full construction documentation set is produced, [5] a new project cost estimate and schedule will be created and, once again, sent to the department for funding approval.

- Once approved, [6] project permits will be issued, contracts secured, and the construction phase will be initiated. Upon completion, appropriate documentation will be filed and final billing will be transacted.
Project Schedule - Typical Timeline

**Process**

**SDSU, Project Mgmt**

**Project - 74**

**Note:** W.O. Submission Deadline is Winter Break for Expected Fall Occupancy.

**Work Requests Can Be Submitted Throughout The Calendar Year . . .**

<table>
<thead>
<tr>
<th>Phase 1 - ROM</th>
<th>01/01</th>
<th>01/16</th>
<th>Begin when WCC issues a Work Order to PM</th>
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<tbody>
<tr>
<td>Visit Client</td>
<td>01/01</td>
<td>01/07</td>
<td>approx 1 wk (5 bus. days)</td>
</tr>
<tr>
<td>Scope Project</td>
<td>01/08</td>
<td>01/09</td>
<td>approx 2 bus. days</td>
</tr>
<tr>
<td>Establish Anticipated CDBO Direction</td>
<td>01/12</td>
<td>01/13</td>
<td>approx 2 bus. days</td>
</tr>
<tr>
<td>Prepare ROM Phase Est. -75% accuracy</td>
<td>01/14</td>
<td>01/15</td>
<td>approx 2 bus. days</td>
</tr>
<tr>
<td>Forward to WCC for Dept. Apvr.</td>
<td>01/16</td>
<td>01/16</td>
<td></td>
</tr>
</tbody>
</table>

**Phase 2 - D&D**

| Establish Contracts for Design Services | 02/02 | 02/20 | approx 3 wks (15 bus. days) |
| Develop CDs | 02/03 | 03/13 | approx 3 wks (15 bus. days) |
| Review of CDs | 03/16 | 03/20 | approx 1 wk (5 bus. days) |
| Complete CDs | 03/23 | 04/10 | approx 3 wks (15 bus. days) |
| Review CDs | 04/13 | 05/17 | approx 1 wk (5 bus. days) |
| Do Agency Reviews | 04/20 | 05/15 | approx 3-6 wks (15-30 bus. days) |
| Prepare D&D Phase Est. - 95% accuracy | 04/20 | 05/01 | approx 2 wks (10 bus. days) |
| Forward to WCC for Dept. Apvr. | 05/18 | 05/18 |                                         |

**Phase 3 - Implementation**

| Obtain Permits | 06/02 | 06/15 | approx 2-4 wks (10-20 bus. days) |
| Award JOC (if contract) | 06/02 | 06/22 | approx 3 wks (15 bus. days) |
| Establish Support Contracts | 06/02 | 06/22 | approx 3 wks (15 bus. days) |
| Construct & Inspect (Classes Begin 8/24/15) | 06/23 | 08/17 | approx 8 to 12 wks (40-60 bus. days) |
| Close-out: Final, Bill, File NOC | 08/18 | 08/31 | approx 2 wks (10 bus. days) |

**Phase 1 - Implementation**

| Obtain Permits | 06/02 | 06/15 | approx 2-4 wks (10-20 bus. days) |
| Award JOC (if contract) | 06/02 | 06/22 | approx 3 wks (15 bus. days) |
| Establish Support Contracts | 06/02 | 06/22 | approx 3 wks (15 bus. days) |
| Construct & Inspect (Classes Begin 8/24/15) | 06/23 | 08/17 | approx 8 to 12 wks (40-60 bus. days) |
| Close-out: Final, Bill, File NOC | 08/18 | 08/31 | approx 2 wks (10 bus. days) |