

Successful Project Management

Over \$25k Projects

Under \$25k Projects

Force Account Projects

MAHAMS CONFERENCE

September 30, 2013



Project Management

Project Management is the application of knowledge, skills, tools and techniques to project activities.

- Must balance scope, schedule, budget, and quality
- Customize tasks for different team members



Project Management Core Tasks

Manage expectations

Strive for consistency across projects

Avoid miscommunication

Build trusting relationships

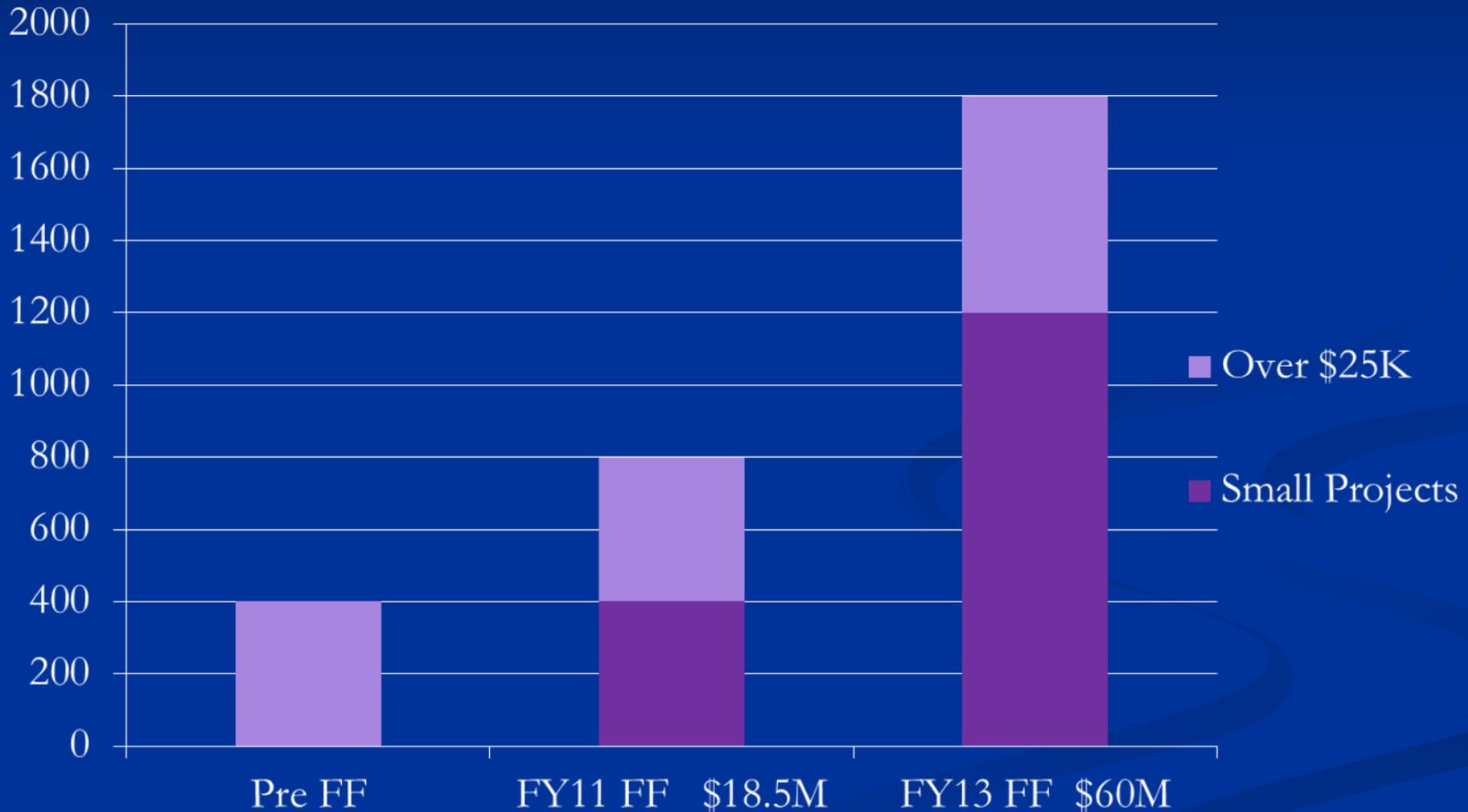
Manage the financial details



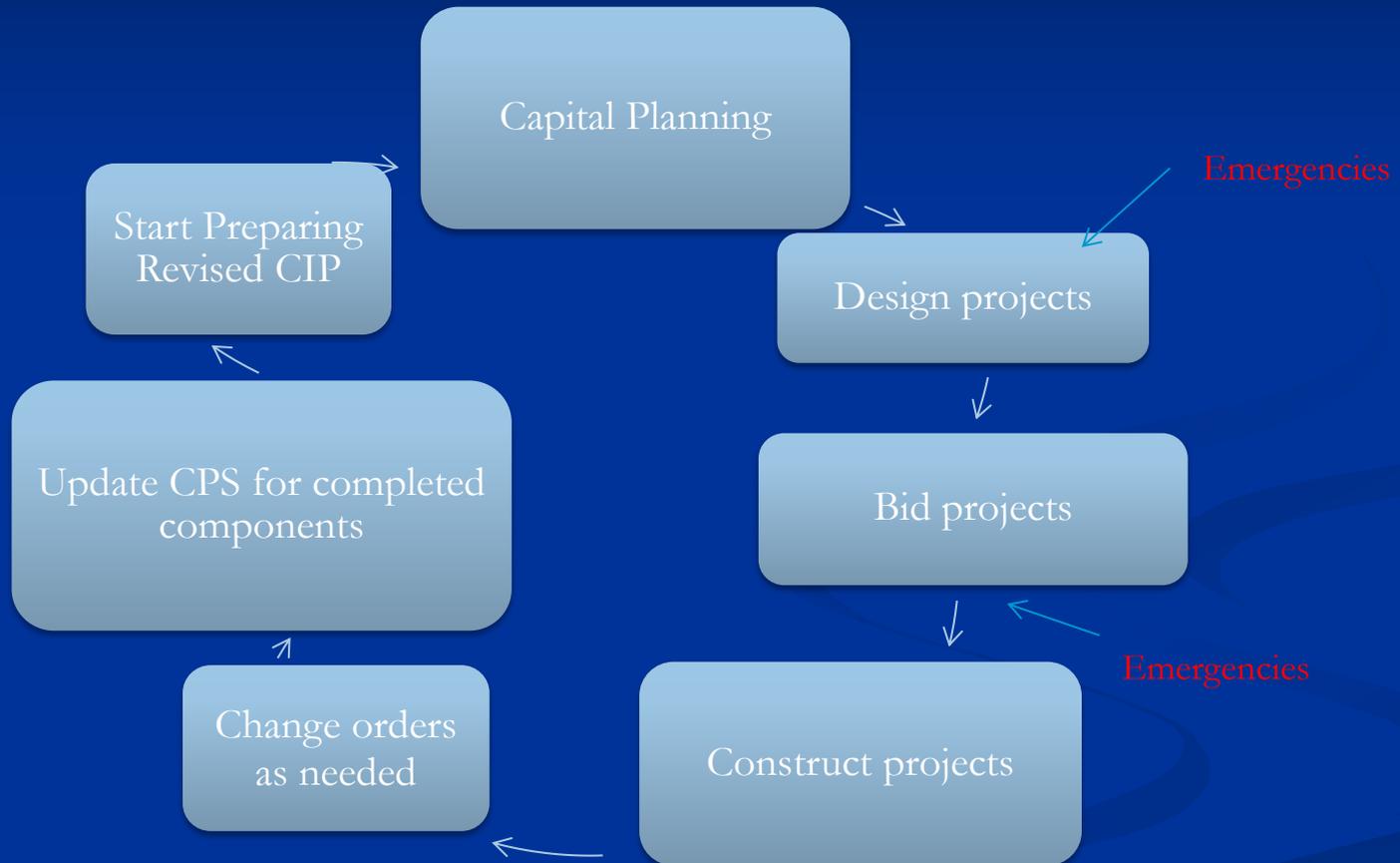
The New World of Formula Funding

- Capital plan based system
- Costs of projects have decreased
- Number of projects have increased
- More emphasis on technical assistance and training
- Delegation of “small” under \$25k project mgmt to LHAS:
 - Scoping
 - Procurement
 - Closeout

Small Projects Proliferate!



Project Management Cycle:



Implementation of Over \$25k Projects

After CIP approval, for larger projects (est. construction > \$25K, DHCD architects and engineers will:

- help LHA “scope” the projects
- prepare WO or RFS to select a design consultant
- continue to complete design reviews

Implementation Over \$25k Projects

- DHCD will work with you through the bid process and review/approve bids and contracts
- Construction Advisors will:
 - Attend construction meetings
 - Sign off on requisitions, change orders, closeouts

LHA Role/Tasks For Over \$25K Projects

- Keep projects on schedule – proactively management progress of project
- W/O & RFS – provide timely feedback to DHCD Staff on scope, budget and schedule
- If DSC is required, coordinate with DSC coordinator to schedule and submit required docs. for meeting
- Provide timely feedback on design submissions and reviews

LHA Role/Tasks For Over \$25k Projects

- Coordinate with PM on advertisement dates
- Coordinate with PM & Candy on bidding process (bids, addendums, alternates)
- Schedule Board Vote for award of Contracts promptly

LHA Role/Tasks

For Over \$25K Projects

- Coordinate with Candy on contract documents
- Send signed construction contract to PM in a timely manner
- Schedule pre-con meeting/Issue NTP
- Administer construction (coord. with CA on change orders)
- Expedite contract reqs. so that payments are made within 30days of CA's approval

Implementation of “Small” Under \$25K Projects

After CIP approval, for small projects (est. construction < \$25k, LHAs will manage projects independent of DHCD staff



Small Project Planning and Scoping:

Prepare detailed scope of work

- Determine if the project will require a building permit
- Determine Bidding requirements
- Determine whether project needs a licensed A/E
- Prepare Plans, tech. specs. and a detailed cost est.

Small Project Design and Documentation (The Bid Package)

- Obtain and assemble appropriate front end
Include a standard form for quotes
- Check for template specs
- Attach scope of work, plans, and tech. specs.
- Apply for wage rates and attached to bid package &
bid project within 90 days
- Include a date in the advertisement for the site visit

Small Project Procurement (The Bid Process)

- For projects less than \$10k solicit bids using sound business practices
- For $\$10k < < \$25k$ submit a public notification
- Distribute bidding docs. to contractors
- Conduct site visit for interested bidders
- Answer questions – all answers must to all contractors.
- Receive quotes.

Small Project

Bid Review and Contract Award

- Check contractor's references
- Verify that contractor is not debarred
- Board vote award of contract (needs to be done within 30 days of bid opening)
- Send a low bid approval letter & construction contract to contractor
- Obtain contractor's cert. of insurance
- Execute Contract

Small Project Construction

- Schedule a pre-con meeting
- Issue a notice to proceed
- Contractor obtains and LHA pays for building permits
- Make work area avail. to contractor
- Provide resident coordinator, if required
- If required, approve submittals
- Review/approve change orders, if required

Small Project Close Out

- Execute a Certificate of Final Completion
- Prepare and submit Certification of Compliance
Make prompt payments
- Maintain project record
- Update CPS

Force Account Jobs

Include in CIP or send a detailed request to your PM with:

- A detail scope of work
- Performance specs. For the materials to be used
- A budget (breakout between materials, labor and soft costs)

Force Account Jobs

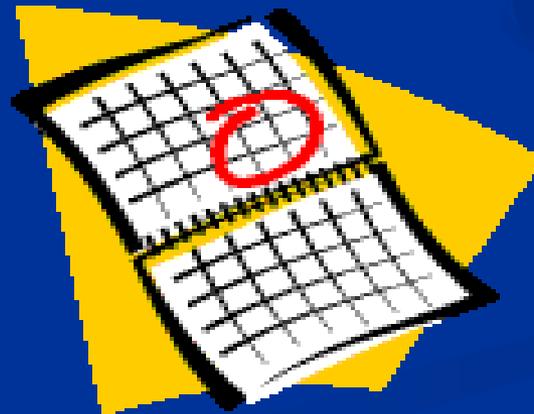
- Hourly rate: for work completed within the regular work week, hours are to be billed at the employee's regular hourly rate, up to 40 hours.
- DHCD review of work: If work exceeds \$10k Construction Advisor needs to review comparable work done by same personnel.
- If work exceeds \$25k, submit a detailed request to your PM for approval by DHCD.



Expectations from LHAs For All Jobs

SCHEDULE

- LHAs need to keep schedule to meet the spending projected in CIP

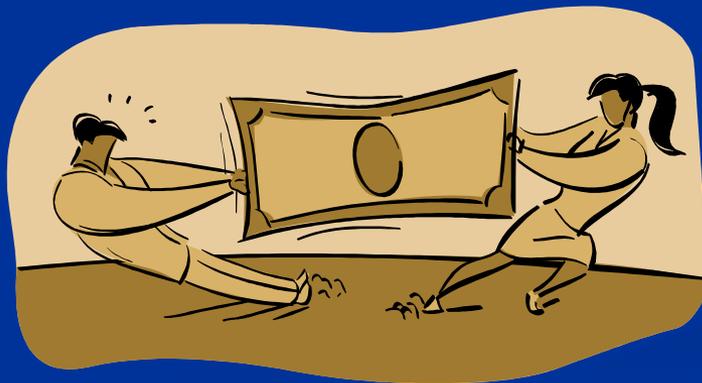


Expectations from LHAs

For all Jobs

BUDGET

- If budget for one project goes up, the budget for another project needs to do down
- Most of the funding has been given out to LHAs. DHCD has little ability to fill funding gaps



Expectations from LHAs

For all Jobs

CPS: Keep it current

- Updates when projects are complete
- Updates to components to reflect changed conditions

How to tell when your Project is a Success

When your project is completed on schedule & within budget and your prioritized needs are met!



Contact Information

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- DHCDs Small Projects Guide website:
<http://www.mass.gov/hed/housing/ph-mod/0-25000-dhcd-small-projects-guide.html>.