



A guide to provide insight into the process of building project development.

Envisioning the journey....vision / goal definition:

“A problem well stated is a problem half solved.” ...Charles Kettering

“Be careful what you ask for.”Dad

I’m not sure which of these quotes is more relevant to the initial phase of project development but both are excellent guiding principles. If you haven’t defined what you want and just ask for help, you will be amazed at the range of what you will get and, more than likely, it won’t be what you really need.

Project development is a process which means always checking to be sure the direction aligns with the overall goals and if those are not clearly established it is easy to get “off-track” and waste a lot of valuable resources.

Many organizations start out with a vision statement or goal definition but if the reason behind the vision or goal isn’t clear the results may be less than satisfactory. Below is a list of questions that an organization should consider before hiring any consultants (or at least the first consultant should be someone to facilitate the development of the answers).

- Why is any action being considered? (business opportunity, operational issues need to be addressed, problems need to be fixed, perception issues, etc...)
- What would be the result of doing nothing?
- What would be the benefit / value if the vision / goal is achieved?
- How much risk is acceptable related to pursuing the vision / goal at each phase?
- Who are the stakeholders and when should they be involved?
- What information is required for decisions to be made? (financial, operational, existing conditions)
- Does data need to be gathered to define the issues or support the decision process?
- Is time a factor?
- Will this project impact future options?
- What expertise / knowledge is required to help define the issues?
- How will the decisions be made?
- How will the project be financed? – Will this affect the project schedule/structure?

There are a number of consultants (program managers, architects, commissioning agents, owner's representatives, facilitators, etc...) that could take part in this process to help answer these questions and define the vision or goal but the more definition developed before outsiders are involved the better their involvement can be defined and direction controlled.

Planning the journey...selecting the team:

The team is a critical part of making the journey a success. If any members of the team do not share or are not committed to the vision they can burden the process with additional time and cost. There are probably as many reasons for lack of commitment as there are consultants but the better expectations and responsibilities are defined up front, the easier it will be to evaluate performance and request compliance.

This definitely falls in the "easier said than done" category and there is probably not a good substitute for experience. On larger projects an owner's representative or program manager may be involved to develop scopes and relationship requirements. On smaller projects the consultants may help to define scope and responsibilities. Titles and terms can get confusing so included below are a few definitions:

- **Program Management:** *The process of managing multiple interdependent projects that lead towards an improvement in an organization's performance.*
- **Project Management:** *The discipline of the planning, organizing and managing resources to bring about the successful completion of specific project goals and objectives.*
- **Commissioning:** *The commissioning Process is a quality-oriented process for achieving, verifying and documenting that the performance of facilities, systems, and assemblies meet defined objectives and criteria. (ASHRAE Guideline 0-2005, The Commissioning Process)*

Program management is concerned with doing the right projects, whereas project management & commissioning are about doing projects right.

These responsibilities may be separate, combined under a single consultant, or distributed among the design and construction management consultants depending on the owner's in-house expertise and desire to mitigate risk. There are also multiple delivery methods that impact how the team members relate and have direct relation to risk, responsibility and performance. The important questions at this phase are:

- How is the project team going to be structured and who will define the structure? (design-bid-build, negotiated construction management, GMP, design-build, etc...)
- How will the scope be defined for each of the team members? Including:
 - Reporting / decision making structure
 - Schedule
 - Deliverables
 - When consultants are brought in (equipment planning, low voltage/structured cable, security, interior design, art, relocation, etc...)
 - Performance expectations
 - Coordination with authorities having jurisdiction (government, utilities, etc...)
 - Issuing requests for proposals
 - Negotiating contracts
- Will peer reviews, commissioning, LEED certification, etc... be required?

- How will changes be managed / approved?
- Who will document decisions and monitor progress?
- How will the budget be developed and managed throughout the project?
- Are there special requirements dictated by the financing option?

Starting the journey...project kick-off:

Most projects begin with a “kick-off” meeting where the initial team members meet to discuss the initial project parameters (schedule, budget, design issues, etc...) and working relationships. Often team members are eager to get the design process moving but a facilitated meeting to establish the framework for the project will streamline things down the road. Some of the important issues to discuss include:

- Project vision/goals
- Expectations (deliverables, communication, meeting requirements)
- Responsibilities
- Processes (decision making, changes, payments, etc...)
- Reporting
- Schedules, budgets

Be sure to document the discussions and decisions so you have a map to keep the team going in the right direction.

The journey...staying the course:

No journey, or project, goes as planned so the best you can do is plan for changes. As the team delves into the details and decisions are being made at a micro level it is easy to lose focus on the main objectives. As the team comes together to make decisions be sure to reflect on how the decisions will impact the vision or goal. If the preferred option or timing does not align with the original vision, maybe the original objective needs to be refined – be sure to document the change in direction and let the entire team know!

Beyond the in-house staff that is part of the team there can be a large numbers of team members that come and go throughout a project, it is a good idea to have someone keeping track of the team members and their information to be sure everyone that the information affects has what they need. Below is a brief list of team members that may need to share information, several could lead the coordination as long as it is made clear up front it is their responsibility.

- Program Manager
- Owner’s Representative
- Commissioning Agent
- Architect
- Engineers (structural, mechanical, electrical, plumbing, etc...)
- Construction Manager
- Equipment planners & Vendors
- Low voltage/Structured cable/Security Consultants
- Interior Designers/Furniture Planners/Art Consultants
- Relocation Consultants/Movers

There are also a number of authorities having jurisdiction (AHJ) that could have an impact on the project that should be involved early and responsibilities should be assigned to team members to be sure all requirements are established and distributed to the team. Some of these authorities include:

- Local & State officials (building, fire, health etc...)
- Utility company contacts (gas, electric, sewer, waste, cable, etc...)
- Licensing agencies (pharmacy boards, hospital licensing, JACHO, etc...)
- Business partners (doctors, emergency services, suppliers, etc...)

Another important responsibility is tracking and reporting so the team knows where the project stands. Knowing if the project is doing better or worse than expected will help with decisions along the way. Some of the important issues to track are: budget, schedule, work in place, decisions that need to be made, pending changes, issues that could cause delay, etc...

Completing the journey...close-out:

The final months can be very busy and will put a lot of people under pressure. The best way to alleviate a great deal of the perceived pressure is communication. People are much more at ease when they know what to expect and what is expected of them. There are also a number of issues that the team should be sure are in place before the project is considered complete. Some of these are:

- Punch lists (a list of items that still need to be addressed to complete the project)
- Final documentation (as-built drawings, operating and maintenance manuals, warranties, etc...)
- Attic stock (carpet, ceiling tiles, ceramic tiles, special lighting, etc...)
- Testing/commissioning reports (verification everything is working properly)
- Training/moving in (operation the building's systems as well as staff operations)
- Certification of final payments and release of lien waivers
- Celebration (it's a great process and thanking the team and all the supporters is a great way to finish and begin)

I wish you the best on your journey. I would be happy to answer any questions you may have about the process or recommend quality team members, please feel free to contact me. I have enjoyed many a journey and made many friends along the way and will always be glad to have the opportunity to participate in any way on your journey.

Happy Trails!!

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