Client Enrichment Series

Welcome to today’s presentation on:

*Introduction to PBS Project Management*

the presentation will start at *2:00pm EST*

**Note:** Phones are automatically muted during the presentation. You have the ability to send questions to the host and presenters through your questions pane. They will answer as many of the questions as possible throughout and at the end of the presentation. All questions will be captured, and answers sent to all participants within 2 weeks.
Client Enrichment Series

Introduction to PBS Project Management

Hosted by: Leah Fant
National Account Manager
GSA PBS Central Office of Client Solutions

Presented by: Ralph Abel
National Small Projects Program
Office of Design & Construction / Office of Project Delivery
PBS Central Office – Washington DC
Agenda

Our Project Universe

Scope Management

Communications & Partnership

Project Management

Schedule Management

PBS Project Excellence

Successful Projects

Cost Management

Looking Ahead
Our Federal Project Universe

PBS Mission
To promote effective, mobile, sustainable workplace solutions for federal agencies at best value for the American taxpayer

Our Priorities: What Is Important to GSA
- Delivering Better Value & Savings
- Serving Our Partners
- Expanding Opportunities for Small Businesses
- Making a More Sustainable Government
- Leading with Innovation
- Building a Stronger GSA

Our Goals: How We get there
- Savings
- Efficiency
- Customer Service

Results
Solutions that meet our clients needs and exceeds their expectations
Our Project Universe

GSA Construction Project Types

Capital Projects
BA51 / BA55
- Prospectus –Level Projects (over $2.85 Million)
- New Building Construction
- Major Modernizations
- GSA and RWA Funded

Small Projects
BA54 / BA80
- Under-Prospectus Projects (under $2.85 Million)
- R&A and Client Projects in GSA-Owned Buildings
- GSA and RWA funded

Leasing Projects
BA53
- Above or Below Prospectus (all funding levels)
- Client Projects in Commercial Lease Space
- GSA and RWA Funded

Today we will focus on Small Project Management
Small Projects; Big Impact

**PBS Responsibility:**

- Owns or leases more than 9,500 assets (approx. 50/50)
- Maintains approx. of 370 million square feet of workspace for more than 1 million federal employees
- Preserves more than 480 historic properties
- PBS has approx. 600 full-time PMs; plus 400 part-time PMs

**PBS Small Project Delivery:**

- PBS delivers approximately 12-14,000 Small Projects every year
- In FY14 and FY15; PBS delivers 92% of our projects on-time
- National Minor R&A / Client Program worth approx. $380 million / annually
- Deliver approx. 7-10,000 RWAs worth over $1.5 Billion / annually
- National RWA Program of approx. 26,000 active RWAs worth over $4 Billion
Projects Management Basics

Cost constraint refers to a project budget that is realistic and affordable. The Project budget reflects the amount of funding required to meet all project requirements and deliver the final product on schedule.

Time constraint refers to having a project schedule that is achievable and appropriate for the client requirements. This schedule indicates an amount of time required to create, run and accomplish the project.

Scope constraint refers to the technical and functional objectives that define what is done and the quality of the project. The project’s scope is based on a clear understanding of the client needs.

The Project Management Triangle has angles that are called Scope, Cost & Time. Project managers use the PM triangle to visualize a project and understand its constraints.
Project Lifecycle

Initiation
- Assign PM / Sponsor
- Develop Project Charter
- Form Core Project Team
- Hold Kick-Off Meeting – Begin Project Management Plan as a group
- Define Goals & Objectives / Risks & Constraints
- Gather Functional Requirements
- Develop Innovative Options and Solutions
- Prepare Order of Magnitude Estimate

Planning
- Kickoff Meeting
- Refine Project Management Plan (PMP)
- Refine Risks and Constraints
- Develop Technical Requirements
- Develop Closeout & Change Control Process
- Develop Communication Plan
- Review Project Parameters
- Finalize initial: Scope/Schedule/Budget
- Obtain Funding Commitment

Execution
- Contract Award
- Maintain Project Rhythm with Regular Meetings and Updates
- Track Change Orders
- Monitor Risks
- Monitor and Control Contract Activities
- Revisit Project Parameters

Closeout
- Contract and Financial Closeout
- Administrative Transition
- Customer Follow-up
- Lessons Learned
- Celebrate!
The Project Manager Role

“Leads and manages all activities throughout the project lifecycle”

• Leads development of the Project Management Plan (PMP)
• Coordinates Communications Plan and Process
• Clarifies initial requirements and develops final scope-of-work
• Prepares/approves Independent Govt Cost Estimates
• Manages and control project risks and opportunities
• Minimizes and manages project changes and/or modifications
• Keeps the project on schedule, within budget, and in scope
• Monitors and reports project progress and status on a regular basis
What makes a project successful?

Projects meet Requirements & Support Client Mission
• Teams fully understand the client agency’s mission & requirements
• Projects are high-quality and meet client functional goals

Projects are Timely & Delivered on Schedule
• Teams fully understand the client agency’s schedule expectations
• Teams deliver the project within the agreed-upon schedule

Projects are Cost-Managed & Delivered within Budget
• Teams understand the client agency’s budget expectations
• Teams deliver projects within the authorized budget

Strong Partnerships between PBS and Client Agency
• The client agency & PBS partner on goals, schedules, budgets, & significant decisions
• Teams communicate throughout all stages of the project lifecycle
Delivering your Project Scope

PBS Project Scope / Quality Initiatives:

- More quality control/quality assurance applied to the project
- Improved project intake process – regional resource boards
- More time spent developing requirements with customers
- Improved integration with facility operations
- Promoting alternative workplace strategies to reduce space/rent
Delivering your Project on Time

PBS Schedule Management Initiatives:

- Projects measured for On-Time Performance (effects performance ratings)
- New Scheduling Program Division being formed
- Scheduling Guidance & Standards under development
- Consistent scheduling templates and training being established
- More timely Financial Close-Out (key performance indicators evaluated)
- Timely return of RWA funds
Delivering your Project on Budget

PBS Cost Management Initiatives:

- Developing national consistent processes, templates and methodologies for cost estimating; updating P120 Estimating policy and guidance
- Improving cost estimate accuracy and develop performance measures
- Implementing recommended national cost estimating tool in all regions
- Enhancing training for Project Managers who prepare cost estimates
- Implementing Small Project Cost Management guidance with required cost estimating summary sheets, range of accuracies, and standardized estimate names linked to established lifecycle phases of the project.
PBS Partnership Initiatives:

- Client Charter Agreements being instituted on client-facing projects
- Project communication plans better tailored to meet client needs
- Regular project meetings, project status updates
- Individual Post-Project Client surveys as part of project close-out
- Project follow-up meetings or check-in with clients within six months
- Lessons learned completed & documented
- Quarterly project oversight reviews with regional account managers
Fulfilling your Project Needs

PBS Project Solutions / Initiatives:

- Moving towards client-based Project Team Model
  - Service Delivery Excellence (SDE) Initiative
- Project Manager assignment earlier & based on best fit
- PM Partnership with Portfolio Planners / Client Portfolio Plans
- Project Manager Skills Assessment & Registry
- Supporting skill sets by certifying all PBS Project Managers
- Promoting alternative workplace strategies to reduce space/rent
PBS Project Delivery Excellence Actions:

- **Small Projects Program relocated to Office of Design & Construction**

- **Increased usage of project management software**
  - Moved system to cloud & integrated reporting for better performance

- **Small Projects now part of PBS Construction Excellence Council**

- **Participating with Industry Partners** (Construction Industry Institute Studies)

- **Increased emphasis on Sustainability in Small Projects**

- **Rolling-Out National Customer Service Initiatives**
  - Service Delivery Excellence (SDE) Initiative

- **Supporting competencies by certifying full-time PBS Project Managers**
Looking Ahead: What You can Expect

- Improved Scope Development
- Improved Schedule Management
- Improved Cost Management
- Stronger Communications
Questions?
Contact Information

Ralph Abel
National Small Projects Program
Office of Project Delivery / Office of Design & Construction
Public Buildings Service / Central Office
General Services Administration
Ralph.Abel@gsa.gov

Leah Fant
PBS National Account Manager
Office of Client Solutions
Phone: (202) 501-0514
Leah.Fant@gsa.gov
Thank you for joining us today for a discussion on **Introduction to PBS Project Management**

**Future sessions**

- June 18, 2015 – Introduction to Leasing
- July 16, 2015 – Advanced Topics in Leasing
- August 20, 2015 – Introduction to Occupancy Agreements

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