



Client Enrichment Series

Welcome to today's presentation on:

Introduction to PBS Project Management

the presentation will start at 1:00pm EST

Note: Phones are automatically muted during the presentation. You have the ability to send questions to the host and presenters through your "Chat" 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 a formal Q&A document, along with the slides, and a video recording of the session, will be posted on our Client Enrichment Series website found at www.gsa.gov/ces.

COVID-19 and the Federal Community



Business...but not as usual...

[GSA's Coronavirus - COVID-19 Resource Page](#)

Overview, GSA Activities and FAQ's



Client Enrichment Series

Introduction to PBS Project Management

Hosted by: David Hofstetter

Director, Client Development Division
Office of the Deputy Regional Commissioner
PBS Region 4 - Southeast Sunbelt Region



Presented by: Steve Scavo / Don Kottl

Small Projects Zone Managers
National Small Projects Program
Office of Design & Construction
PBS Central Office – Washington DC



Agenda

1. Our Project Universe
2. Project Lifecycle
3. Successful Projects
4. Scope Management
5. Schedule Management
6. Cost Management
7. Communications and Partnership
8. PBS Project Excellence
9. Looking Ahead

Our Federal Project Universe

PBS Mission

Deliver value and savings in real estate, acquisition, technology, and other mission-support services across Government.



The goals and tools of project delivery excellence (PDE) strive toward ensuring that all projects are completed on-time and on-budget, and are delivering value to the customer, supporting their mission needs.

- *Deliver Effective Projects*
- *Optimize our Workforce*
- *Foster Innovation & Excellence*

Our Project Universe

GSA Construction Project Types

Capital Projects

BA51 / BA55 / BA64

Prospectus –Level
Projects
(over \$3.095 Million)

New Building
Construction
Major Modernizations

GSA and RWA Funded

Small Projects

BA54 / BA80 / BA64

Under-Prospectus
Projects
(under \$3.095 Million)

R&A and Client Projects
in GSA-Owned Buildings

GSA and RWA funded

Leasing Projects

BA53

Prospectus
(all funding levels)

Client Projects in
Commercial Lease Space

GSA and RWA Funded

Today we will focus on Small Projects Management

Our Project Universe

Small Projects; Big Impact

PBS Responsibility:

- Owns or leases more than 8,600 assets (approx. 50/50)
- Maintains approx. of 370 million square feet of workspace for more than 1 million federal employees
- Preserves more than 487 historic properties
- PBS has approx. 600 full-time PMs; plus 400 part-time PMs

PBS Small Project Delivery:

- PBS delivers approximately 8-12,000 Small Projects every year
- PBS currently is delivering **86%** of our projects on-time / **84%** on-budget
- National Minor R&A / Client Program worth approx. \$380 million / annually
- Deliver approx. 7-10,000 RWAs worth over \$1.2 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. 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

The **Project Management Triangle** is defined by three project constraints of Scope, Cost & Time.



Project managers use the PM triangle to visualize a project and understand its constraints.

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

Project Lifecycle

Project Pre-Planning

Phase 1 – Project identification

Develop the Project Strategy

Phase 2 – Project Initiative

Develop the Project Plan

Phase 3 – Planning

Execute the Project

Phase 4 – Design and Construction

Close-Out of the Project

Phase 5 – Close-Out

- Developed in 2008 to provide PBS with a standard small project life cycle approach for managing projects from simple to complex. It was updated in 2018 to reflect current policy & guidance.
- A collaborated effort from a national team and regional best practices.
- Phases: *Project Identification, Project Initiation, Project Planning, Project Execution, & Close-Out.*

Project Lifecycle Phases 1-2

Project Pre-Planning

Phase 1 – Identification

- 1.1 Early Planning Occupancy Agreement
- 1.2 Project Determination
- 1.3 Decision Making and Program Planning
- 1.4 eRETA Work Request
- 1.5 Client Project and Occupancy Agreements

Develop Project Strategy

Phase 2 – Initiation

- 2.1 Receive and Acknowledge Request
- 2.2 Assemble Project Team
- 2.3 Conduct Needs Interview
- 2.4 Validate Project
- 2.5 Draft Initial Project Management Plan (PMP)
- 2.6 Update Electronic Databases

Project Lifecycle Phase 3

Develop Project Plan

Phase 3 – Planning

- 3.1 Kick-Off Meeting
- 3.2 Develop Technical Requirements
- 3.3 Refine PMP
- 3.4 Finalize Initial Scope/Schedule/Budget
- 3.5 Acquisition Planning
- 3.6 Funding Commitment
- 3.7 Update Electronic Databases

Project Lifecycle Phase 4

Project Pre-Planning

Phase 4 – Design

- 4.1.1 Propose A/E Work Order
- 4.1.2 Issue RFP (Request for Proposal)
- 4.1.3 Design
- 4.1.4 Design Complete
- 4.1.5 Perform A/E Performance Evaluation
- 4.1.6 Update Electronic Databases

Construction

- 4.2.1 Construction Procurement
- 4.2.2 Award Contract
- 4.2.3 Initiate Pre-Performance Activities
- 4.2.4 Issue Notice to Proceed (NTP)
- 4.2.5 Construction
- 4.2.6 Construction Substantially Completed
- 4.2.7 Perform Post Final Inspection
- 4.2.8 Update Electronic Databases

Project Lifecycle Phase 5

Close-Out the Project

Phase 5 - Close-Out

- 5.1 Reconcile Project Financials
- 5.2 Distribute Manuals, As-builts
- 5.3 Perform Construction Contract Performance Evaluation
- 5.4 Final Payments
- 5.5 Update Electronic Databases
- 5.6 Document and Review Lessons Learned
- 5.7 Celebrate Completion Success
- 5.8 Post Occupancy Activities

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 Measure*
- *We've defined up to 18 milestones for project schedules, but each project is unique and has its own project activities. The number of milestones applicable will depend on project size*
- *Scheduling Guidance & Standards developed*
- *Consistent scheduling templates and training*

Delivering Your Project On Budget

PBS Cost Management Initiatives:

- *Developed national consistent processes, templates and methodologies for cost estimating; updating P120 Estimating policy and guidance*
- *Improving cost estimate accuracy and developed 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.*

Delivering Your Project On Budget - Estimates

PBS Cost Management:

- **Cost Planning:** Establishing an overall budget based on known or defined design parameters, project scope, and customer space requirements within the planned execution schedule. The Cost Plan typically serves as the budget baseline, schedule baseline and scope baseline.
- **Cost Estimate** refers to any officially prepared projection of project costs, throughout the project lifecycle, whether planning, design, construction, operations or disposal.
- **Cost Control** is the managing of changes to the project budget.

Type, Phase and Expected Accuracy Range

Order of Magnitude at Project Identification – from 40% to +75%

Pre-Planning at Project Initiation – from -20% to +40%

Budgetary at Project Development – from -17% to +26%

Conceptual Design at Design Phase – from -13% to +22%

ECCA / Construction at End of Design Phase – from -7% to +11%

Contractor Bid/Proposal at Construction Phase – from -4% to +9%

Change Order Cost Evaluation at Construction Phase – from -2% to +3%

for more information on PBS Cost Management:
[PBS Cost Mgmt Principles on YouTube](#)

Communications & Feedback

PBS Partnership Initiatives:

- *PBS Customer Dashboard ([PBS Customer Dashboard on YouTube](#))*
- *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*
- *Promoting project follow-up meetings with clients within six months*
- *More tools and templates are developed for PMs for customer support*
- *Project oversight reviews with regional account and zone managers*

Fulfilling Your Project Needs

PBS **Project**-Level Process Solutions / Initiatives:

- *Moving towards client-based Project Team Models*
 - *Global Project Management (gPM) and Courts Service Validation (SVI) initiatives*
- *Increased usage of project management software*
 - *Enhancing system to more friendly PM User experience*
- *Project Manager assignment earlier & based on best fit*
- *PM Partnership with Portfolio Planners / Client Portfolio Plans*
- *Promoting alternative workplace strategies to reduce space/rent*



PBS Drive to Project Excellence

PBS Project Delivery Excellence Program Actions:

- *Enhanced focus of Small Projects Program within Office of Design & Construction in GSA Central Office*
- *Project Manager Skills Assessment & Registry*
- *Small Projects part of PBS Construction Excellence Council*
- *Participating with Industry Partners (ie, Construction Industry Institute)*
- *Increased emphasis on Sustainability in Small Projects*
- *Rolling-Out National Customer Service Initiatives*
 - *Global Project Management (gPM) and Courts Service Validation (SVI) initiatives*
- *Certifying full-time PBS Project Managers (FAC-P/PM)*

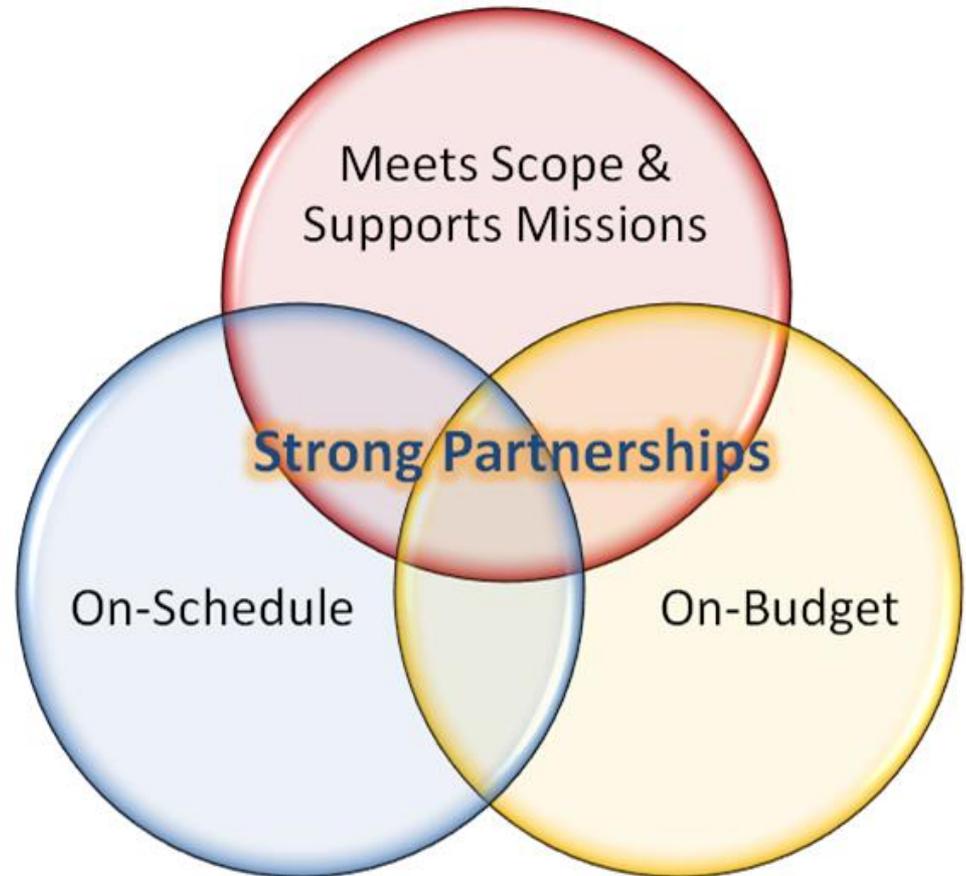
Looking Ahead: What You Can Expect

Improved Scope Development

Better Schedule Management

Comprehensive Cost Management

Stronger Communications



Small Projects Zone Managers

Small Projects Zone Managers

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Zone A –

New England Region (R1)

Northeast and Caribbean Region (R2)

Mid-Atlantic Region (R3)

National Capital Region (R4)

Zone B –

Great Lakes Region (R5)

Heartland Region (R6)

Greater Southwest Region (R7)

Zone C –

Pacific Rim Region (R9)

Northwest / Arctic Region (R10)



Thank you for joining us today for
Introduction to PBS Project Management
Questions?

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Join us for our upcoming VIRTUAL CES sessions

eRETA Digest

Tuesday, May 12th 2020 1pm-2:30pm Eastern [Register Now](#)

What To Expect From Fee Reform

Thursday, May 21st 2020 2:00pm-3:30pm Eastern [Register Now](#)



GSA's COVID-19 Resources for Customers

See our [COVID-19 Website](#) for our Emergency Response Activities

Watch CES sessions on  YouTube

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