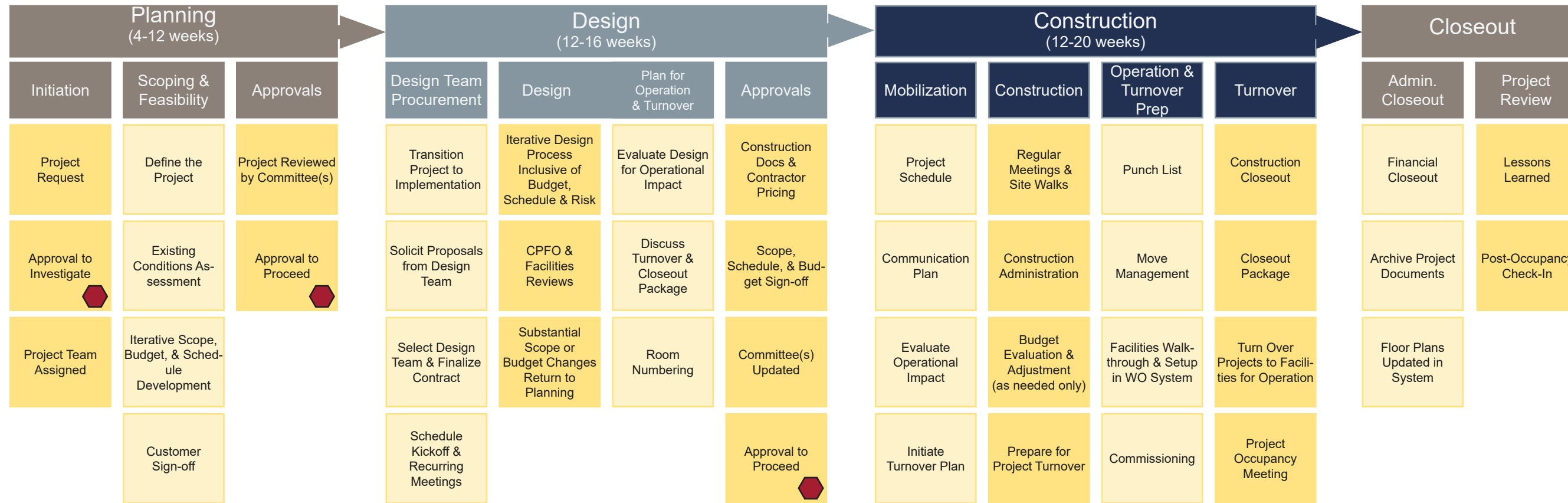


HMS PDP Workflow - Level 2

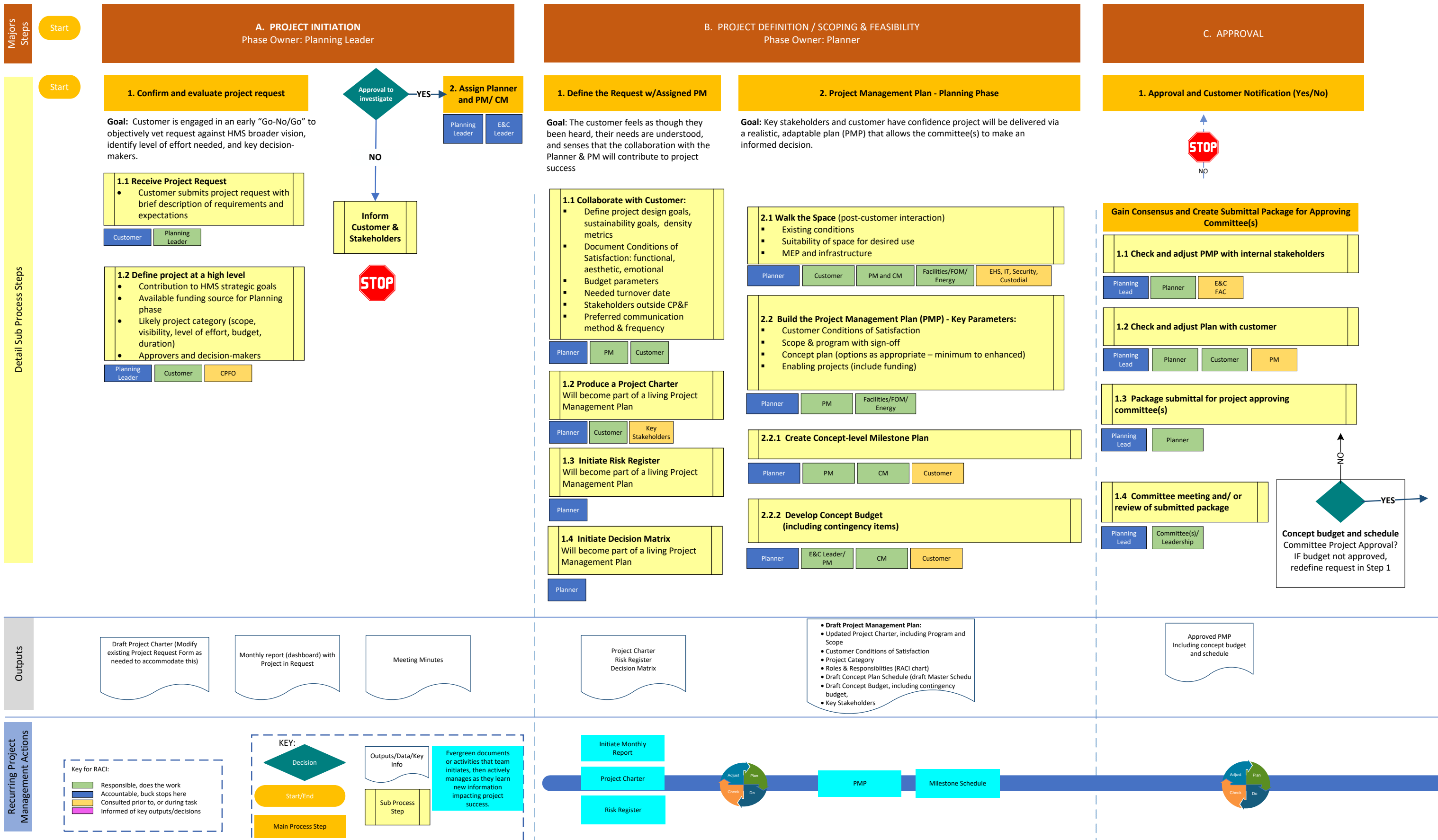
(7-30 months)

Departmental Impact: Moderate to High
 Campus Impact: Low to Moderate
 University Impact: Low



Key

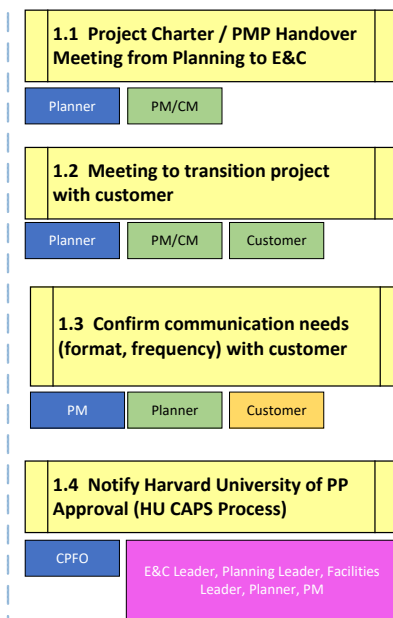
 - Approval required to advance



D. Project Team Selection and Onboarding
Phase Owner: Project Manager

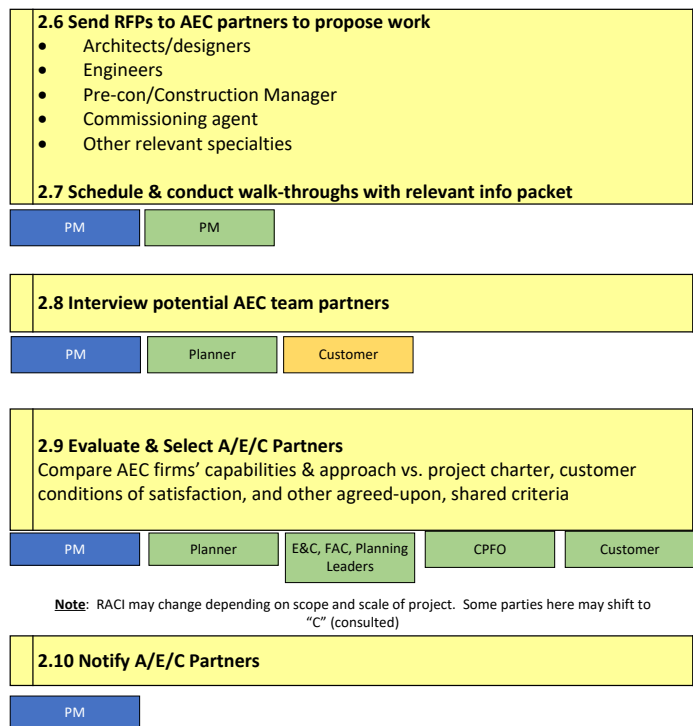
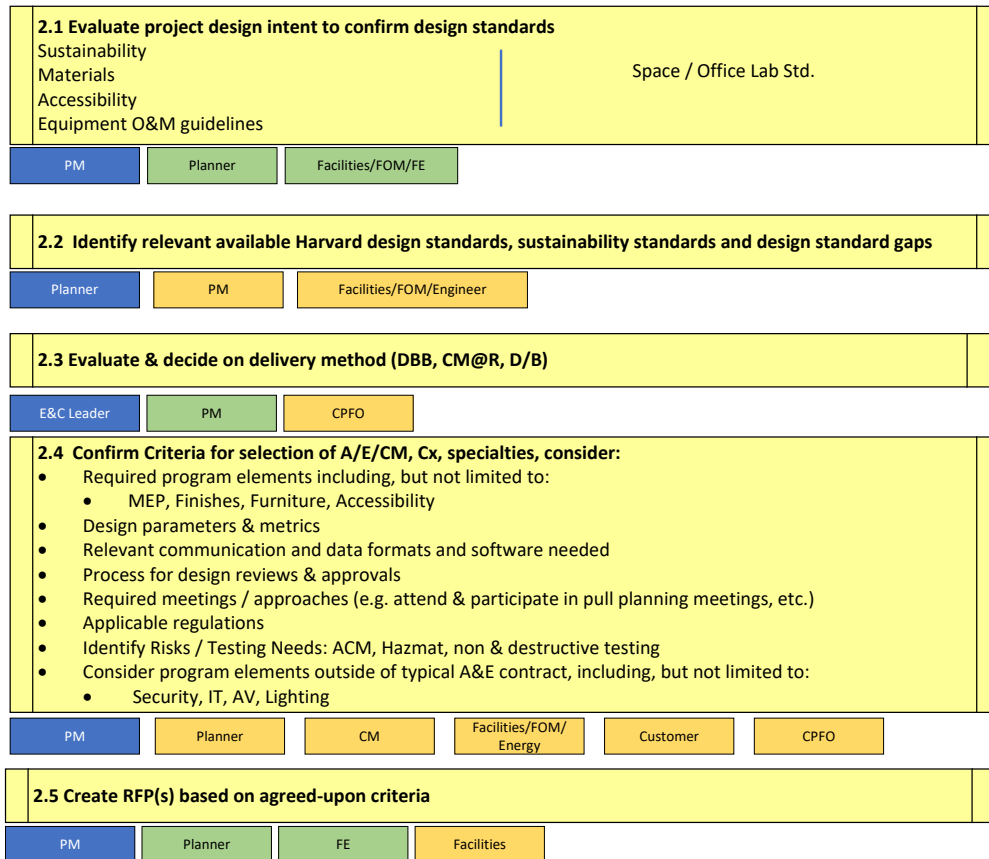
1. Transition from Planning to Implementation

Goal: Customer knows project has shifted to implementation phase, understand timing, how and when they will be engaged in project delivery, and knows their experience is a priority.



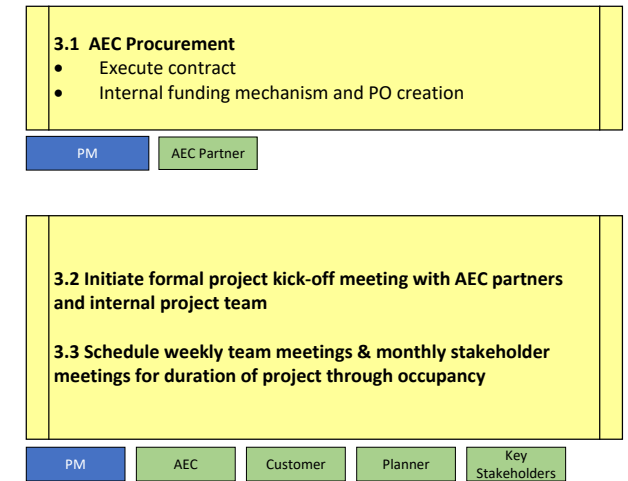
2. RFP and Project Team Awards

Goal: We shepherd the customer's vision from concept to executable form that our Architect, Engineering & Construction (AEC) partners can deliver. We match the right AEC partners with customer's conditions of satisfaction and project category.



3. Onboard AEC team

Goal: AEC team understands scope and Conditions of Satisfaction for process and project success.



PM notify email blast list of project opening and location of PMP

RFP (use standard template) with relevant information/packets

Architect/Engineer/ CM Interview/ Selection Report (use std template) on how/why chosen

Contract

Updated PMP with:
• added team members & roles
• Commissioning needs
• Risks Register: inc. Constructability issues, space constraints, ACM/hazmat needs, other
• Enabling projects & relevant infrastructure needs that will be addressed by this project
• Sustainability Goals (Energy, Carbon, Water, Materials)



Milestone Schedule

Risk Register

E. Design the Project
Phase Owner: Project Manager

F. Pre-Construction Management
Phase Owner: Project Manager

G. Construction Procurement
Phase Owner: Project Manager

H. Construction Mobilization
Phase Owner: Project Manager

1. Develop Design

2. Actively Manage Budget, Schedule & Risks

3. Plan for O&M

1. Deliver construction documents

2. Bid and Negotiate scope and contract

1. Actively manage budget, schedule & risks

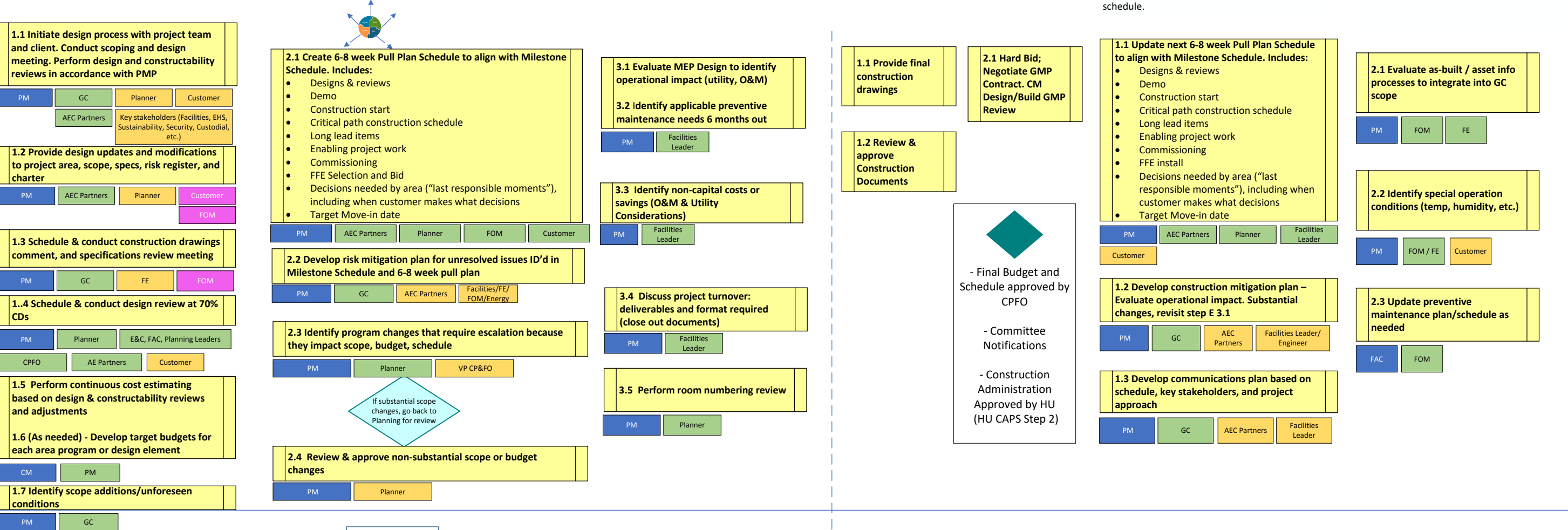
2. Start executing O&M Plan

Goal: Planning, E&C, and Facilities and AEC partners perform design and constructability reviews and collaborate to regularly make problems visible, and the team works together to resolve. All team members contribute ideas and alternatives that can ensure the team delivers the customer's conditions of satisfaction, budget, and schedule.
Outcome: The team has a clear picture of what the project will look like, how it will be executed, by when.

Goal: PM and Construction Manager secure subcontractor partners capable of fulfilling the customer's conditions of satisfaction, budget, schedule, and project approach requirements.

Goal: PM, CM and AE team collaboratively manage production, make reliable promises, identify constraints and escalate to leadership as needed in order to resolve and ensure the team delivers the customer's conditions of satisfaction, budget, and schedule.

Goal: We make use of available information to start the O&M process so that Facilities is prepared and trained upon turnover, and we prevent emergencies and failures of customer's systems and equipment.



I. Construction Phase/Install & Commissioning
Phase Owner: Project Manager

J. Project Turnover
Phase Owners: Project Manager and Facilities

K. Project Closeout
Phase Owners: Project Manager and Facilities

1. Actively manage schedule & risks

2. Financial project management

3. Execute project

4. Execute O&M Plan to 80% integration into O&M process, programs, systems

5. Commission Project

1. Turnover Project to Facilities

2. Final 20% integration into maintenance & operations process, programs, systems

3. Turnover Project to Customer

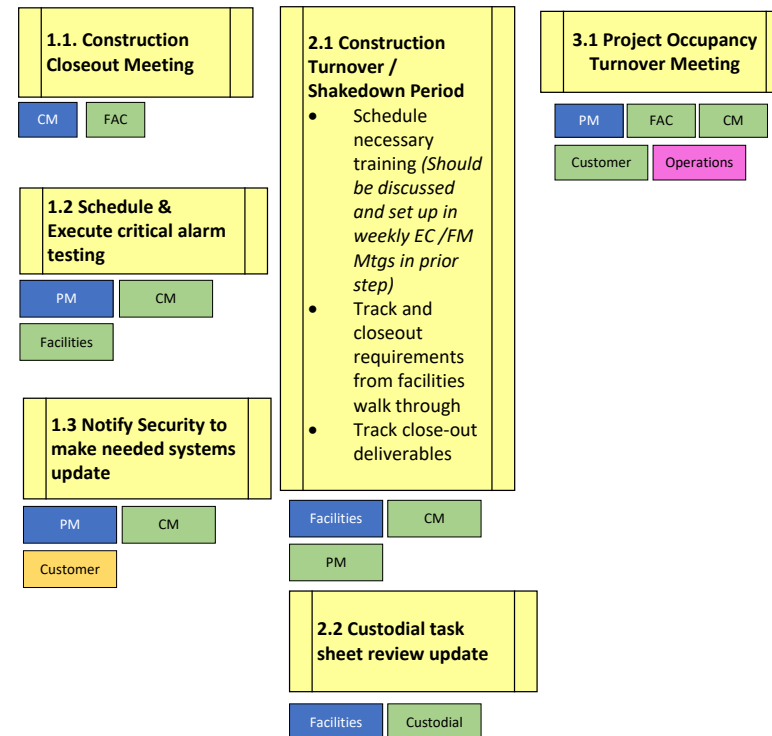
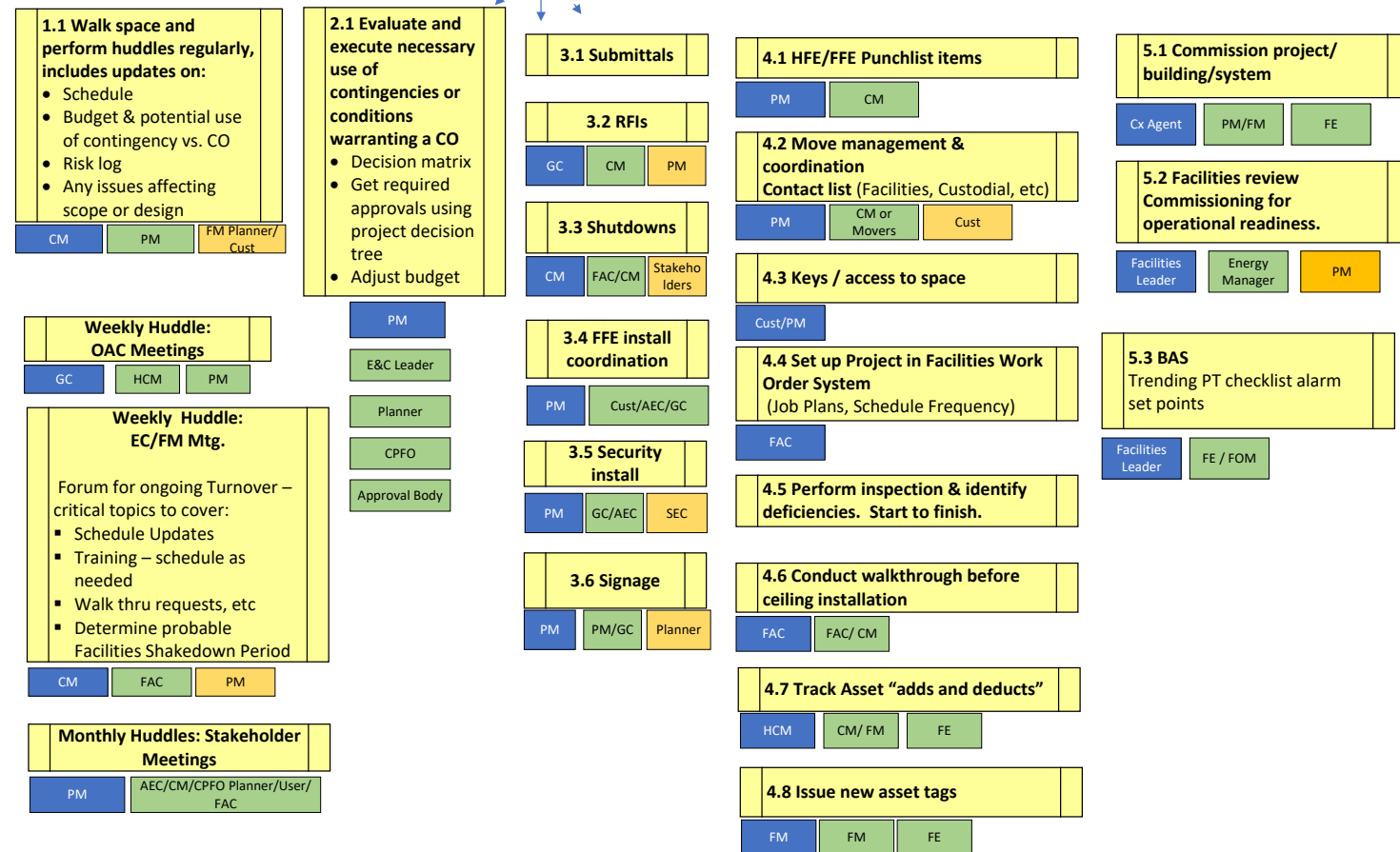
1. Administrative Closeout

2. Project Review

End

Goal: PM, CM and AE team collaboratively manage production, make reliable promises, identify constraints and escalate to leadership as needed in order to resolve and ensure the team delivers the customer's conditions of satisfaction, budget, and schedule.

Goal: Completed space is fully functional in accordance with customer's conditions of satisfaction, Facilities is ready to maintain in accordance with their operational conditions of satisfaction. No outstanding punchlist items. Adequate Facilities Shakedown periods based on complexity of project and schedule.



Meeting Minutes

FFE Warranty Info

Asset Forms

Commissioning Report
Inspection Report

Updated floor plans
Critical Alarm Form
Close-out package, inc.:
O&M manuals
As-builts
Warranties

Close-out package
Lessons Learned
Improvement Goals

Identify and share unexpected field conditions → Risk Register

Conduct meetings, share meeting notes, make visible: decisions & action items & resolution; actively update Harvard central files (SharePoint) with critical project information and documents (e.g. pull from ProCore, Ebuilder, etc.)