Project Charter Process Narrative

Purpose

The purpose of the Project Charter process is to understand, summarize, and present key project information in a concise manner, which will be reviewed and prioritized by FP&C Leadership, or returned for revision. During development of the Project Charter, the PM will review project information, including any Notes or Documents supplied with the project, and verify/identify the correct Requesting Entity and establish a positive relationship with the client. The PM will also develop a basic Project Scope, determine if a design professional is required, if any permitting will be required, create an initial Project Budget and Project Schedule, recommend a Delivery Method for the work, and confirm the funding source(s) for the project.

Initiator

The Project Charter process is initiated by the Project Manager (PM). The PM can start developing the Project Charter after they have acknowledged the project request in eBuilder.

Key Terms

Project Charter	A set of information containing estimates for Project Cost and Project Schedule, as well as Delivery Method, developed by the PM after meeting with project requestor, walking the site, and reaching an agreement on the Project Scope.
Project Charter Process	The eBuilder process the PM initiates after inputting estimated information into the Cost and Schedule modules and selecting a Delivery Method. The process requires the Manager, Facilities Planning (MGR) and/or Director to review and approve.
Project Requestor	Individual who submits a Minor Project Request Form.
Campus Client (CC)	Ongoing Point of Contact for the Minor Project for the Requesting Entity.
Requesting Entity	Entity requesting the Minor Project such as a College, Department, Office, or Auxiliary.
Delivery Method	Method describing how the Contractor for the project will be selected. Delivery Methods consist of Competitive Bid (eB Quotes), Direct Selection, and Rotation.

Key Steps
Start: Project Review - PM Reviews Project Details and attached documentation in eBuilder
Step1: Initial Interaction - PM initiates communication with Project Requestor
Step2: In-Person Meeting/Site Visit
Step2A (Optional): AE Site Visit and Budget Input
Step3: Develop Budget Estimate
Step3A: FP&C Assistant Director Approves Budget
Step4: Develop Project Schedule
Step5: Determine Delivery Method
Step6: Confirm Funding Source(s)
Step7: Create Project Charter
Finish: Management Approves or Rejects Charter

Project Review
The starting point of the Project Charter is the review of a newly assigned and acknowledged project. Before reaching out to the listed CC, the PM reviews information listed in the Project Details section of the eBuilder project, as well as reviewing any documents that were attached. If the PM has any questions about the information, they can reach out to the Construction Project Coordinator for clarification.

Initial Interaction
After the Project Review has been performed, the PM should be equipped with quality information. The PM calls the CC to:
• Introduce themselves and advise that they are the PM assigned to the (Project Name) • Provide their contact information and the Project Number to the CC • Verify if the CC is the correct Point of Contact for the project, and if there are any other individuals the CC would like include in project communications • Discuss the project and determine if the CC has any expectations around the project cost or completion time frame • Determine if the CC is available for an in-person meeting/site visit (in almost all cases this is advisable) • Add notes from this interaction in eBuilder to memorialize the discussion • Add any additional personnel requested during the call to the Project Participants list • Schedule the in-person meeting/site visit with the appropriate individual(s) as discussed

In-Person Meeting/Site Visit
In most cases the PM should arrange a site visit with the CC where they can: • Meet with the CC to present the project scope based on the original Project Details and initial conversation • Gather additional information including an observation of existing site conditions • Re-confirm the project scope, and advise the POC on next steps • Notes from this meeting should be entered into eBuilder as soon as practicable

Develop Budget Estimate	(***see Project Charter Budget Narrative***)

- **Design Professional will be Required – YES/NO**
  - **YES**
    - AE selected to participate in project
    - PM meets with AE to walk site and get rough estimates of job costs
  - **NO**
    - PM uses prior experience to determine cost estimates
- **e-Builder Cost Module – Create Budget Estimate**
  - PM should use Budget Template, then delete non-applicable line items
  - PM enters estimated values into applicable budget line items based on information gathered and/or prior experience
  - Once all budget values have been input, PM selects Submit Budget to move the project budget into the Assistant Directors court for approval
  - eBuilder saves information continuously in the Cost module so there is no need to save work as you go

Develop a Project Schedule	(***see Project Charter Schedule Narrative***)

- **e-Builder Schedule Module – Create Schedule**
  - A schedule template will be applied by the Project Assistant before assigning the project to the Project Manager
  - Depending on project scope, remove any non-applicable schedule tasks
  - Review Predecessors to ensure all are properly synced – templates include predecessor relationships already. If the PM adds any new tasks, they must set these relationships manually.
  - Review Construction Time to ensure that it matches client and realistic expectations
  - Save a snapshot of the completed schedule

Determine Delivery Method

• Based on client need / project timeline, and award policy, PM should select the appropriate Delivery Method for Continuing Service Contractors
  ○ In-house completion (Typically an FO Work Order)
  ○ Completion by a single trade
  ○ Completion by more than one trade with UCF oversight
  ○ Completion by Job Order Contractor (JOC)
  ○ Completion by a licensed General Contractor (GC)
  ○ Completion by a licensed Construction Manager (CM)
  ○ Completion by a Design Builder
• Projects less than $35K
  ○ PM will create a Statement of Work (SOW)
  ○ Rotation
  ○ Job Order Contract
• Projects over $35K awarded to General Contractors
  ○ PM will create a Statement of Work (SOW)
  ○ Job Order Contract
  ○ E-B Quotes
  ○ Direct Selection with Justification
• Projects over 35K awarded to Construction Managers
  ○ PM will create a Statement of Work (SOW)
  ○ Justification

Confirm Funding Source(s)

• Discuss with the client how the project will be funded, noting that the budget estimate may change depending on various factors, and identify the accounts from which funding will be pulled
  ○ E&G - Education & General
  ○ C&G - Contracts & Grants
  ○ AUX - Auxiliary Funds
  ○ OTHER

Create the Project Charter

The following how to guide has been developed for the PM to reference as they initiate the 02 – Project Charter process in e-Builder.

How to guide – The Project Charter

The e-Builder Project Charter is comprised of the following sections:

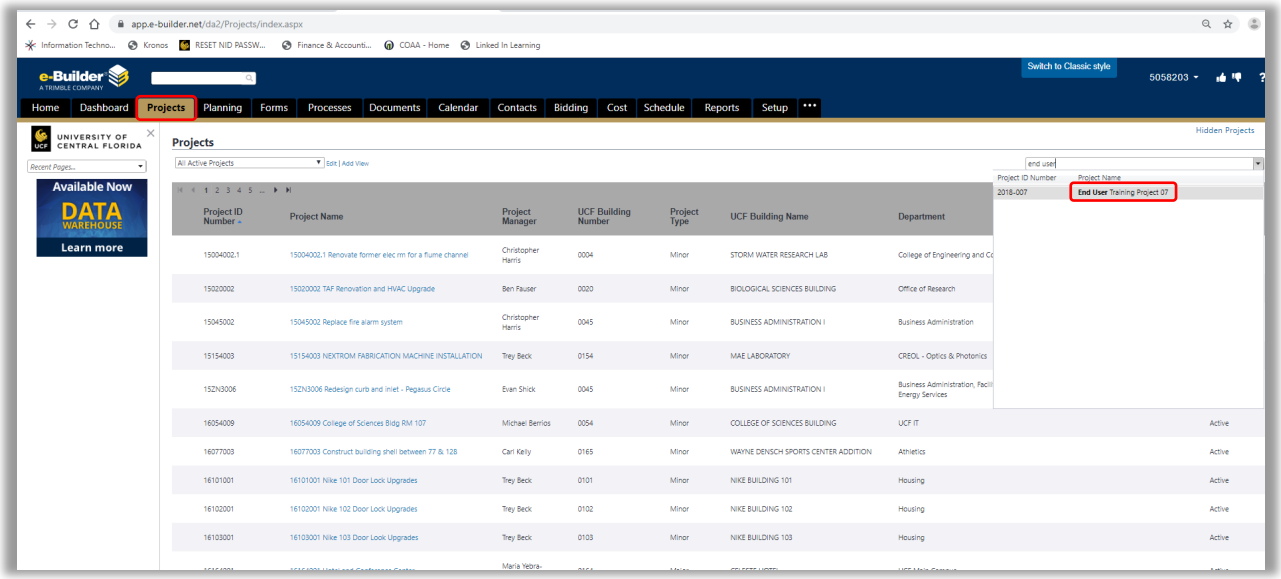
Header	Project Name, Number, and Subject
PROJECT INFORMATION	General information about the project
DESIGN	Used only if the project requires design professionals Select recommended design professionals as applicable
PROJECT COST REPORT	Requires approved project cost/budget
PROJECT COST	PM uploads project cost report here
PROJECT TIME REPORT	Requires completed project schedule to execute
PROJECT SCHEDULE	PM uploads project schedule here
PERMITTING	Captures anticipated permitting requirements
BIDDING/AWARD/CONSTRUCTION	Select Delivery Method and provide recommendation logic Select recommended vendors for each activity as applicable
APPROVAL	Records approval actions of PM, MGR, and Director

Before initiating the Project Charter process, the PM should complete the below pre-requisites:

1. Review comments in the Project Details Notes tab for information added during the Project Request Process
2. Review all documents contained in the Project Details Documents tab for any documents added during the Project Request Process
3. Meet with the requester and any relevant partner departments to develop a basic scope
4. In the e-Builder Cost Module, create the Project Budget
5. In the e-Builder Schedule Module, create a Project Schedule

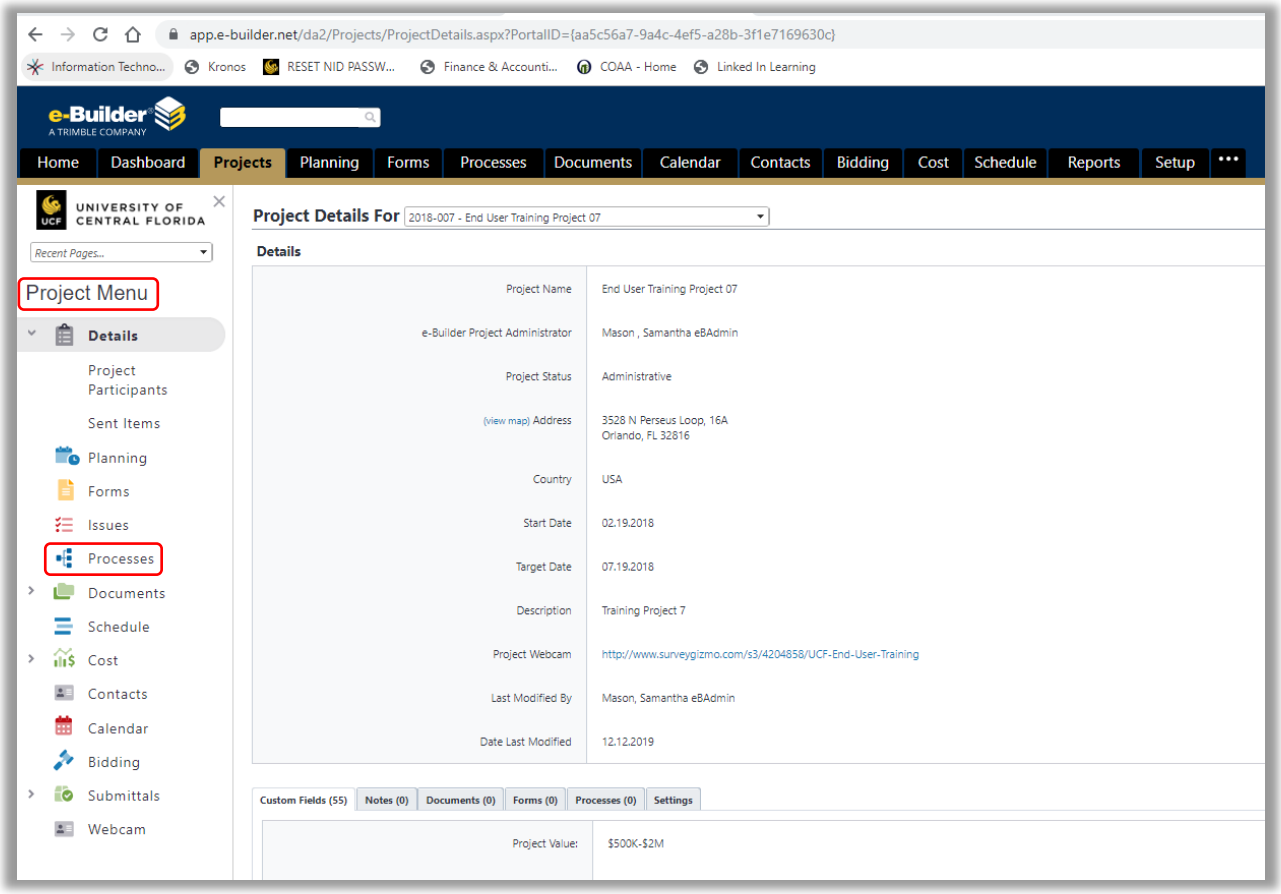
Once all pre-requisites are completed, access e-Builder and select the Projects menu tab.

From the e-Builder Projects screen



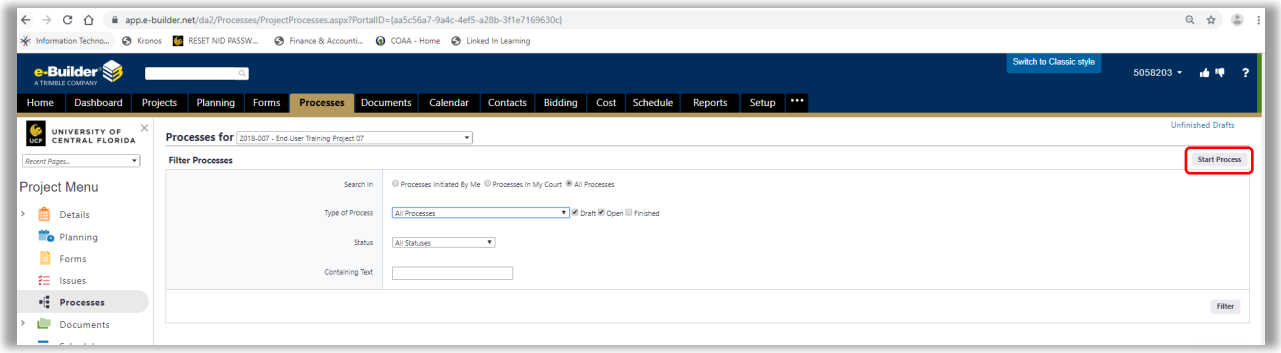
- Search for and select the project for which you with to initiate the 02-Project Charter Process

From the Project Menu



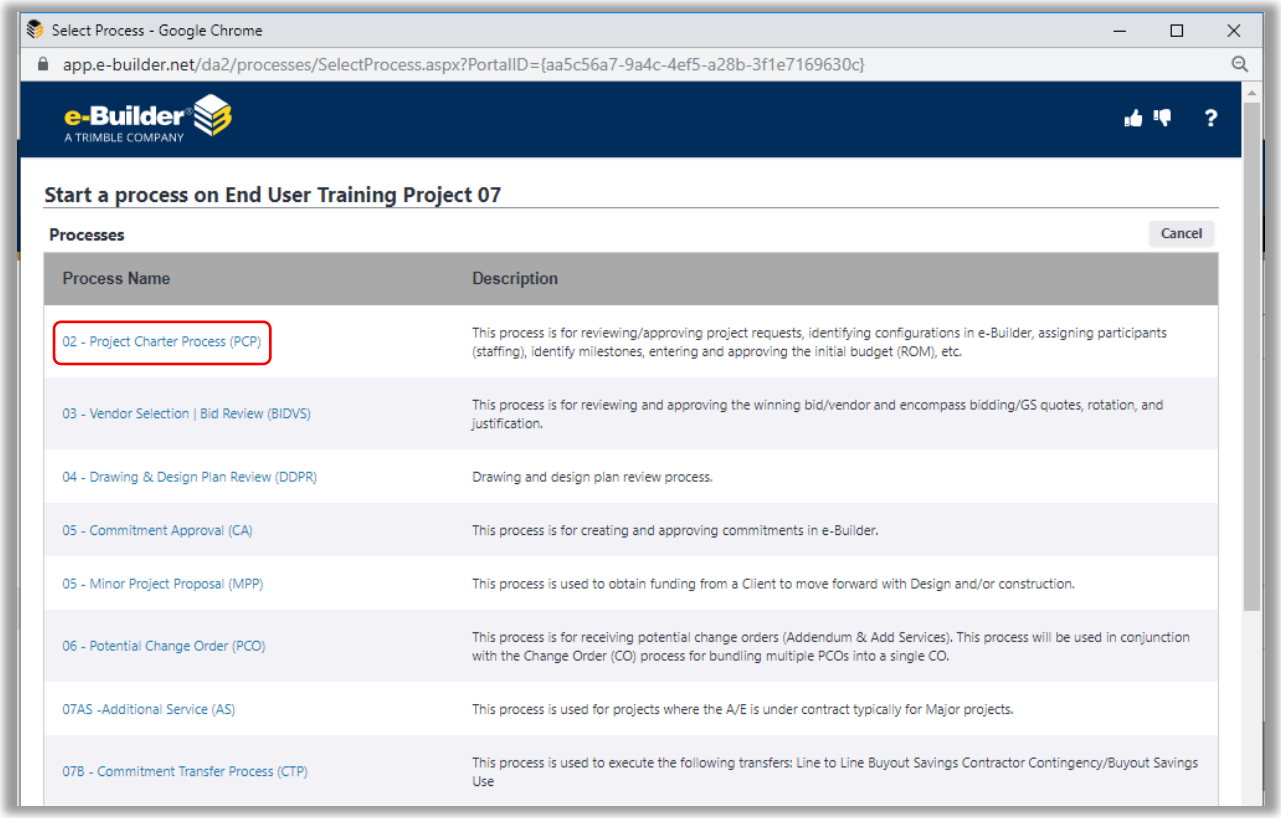
- Select the Processes link

From the Processes screen



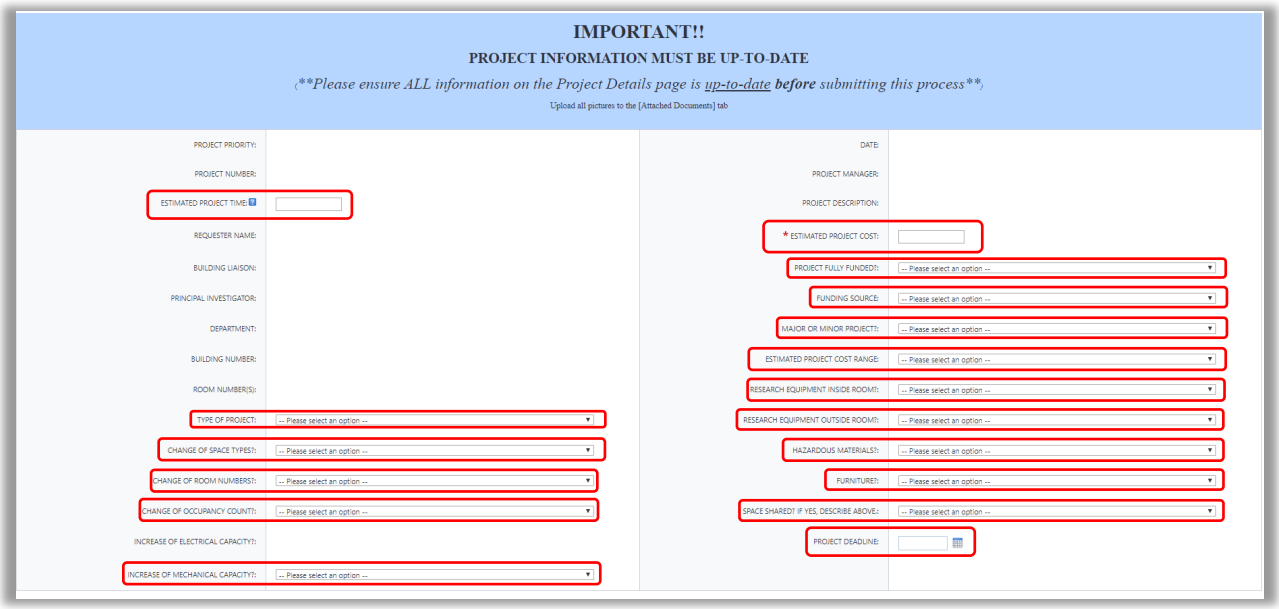
- Select the Start Process button

From the Start a Process pop-up window



- Select the 02 – Project Charter Process (PCP) link

From the 02 – Project Charter Process (PCP) screen – PROJECT INFORMATION section



IMPORTANT!!

PROJECT INFORMATION MUST BE UP-TO-DATE

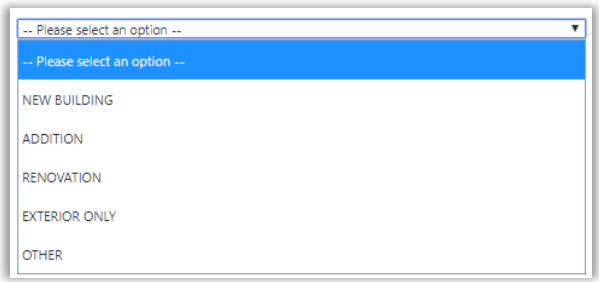
*(**Please ensure ALL information on the Project Details page is up-to-date **before** submitting this process**)*

Upload all pictures to the [Attached Documents] tab

PROJECT PRIORITY:
PROJECT NUMBER:
ESTIMATED PROJECT TIME:
REQUESTER NAME:
BUILDING LIAISON:
PRINCIPAL INVESTIGATOR:
DEPARTMENT:
BUILDING NUMBER:
ROOM NUMBER(S):
TYPE OF PROJECT: -- Please select an option --
CHANGE OF SPACE TYPES?: -- Please select an option --
CHANGE OF ROOM NUMBERS?: -- Please select an option --
CHANGE OF OCCUPANCY COUNT?: -- Please select an option --
INCREASE OF ELECTRICAL CAPACITY?:
INCREASE OF MECHANICAL CAPACITY?: -- Please select an option --

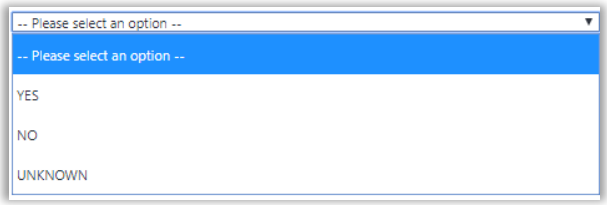
DATE:
PROJECT MANAGER:
PROJECT DESCRIPTION:
* ESTIMATED PROJECT COST:
PROJECT FULLY FUNDED?: -- Please select an option --
FUNDING SOURCE: -- Please select an option --
MAJOR OR MINOR PROJECT?: -- Please select an option --
ESTIMATED PROJECT COST RANGE: -- Please select an option --
RESEARCH EQUIPMENT INSIDE ROOM?: -- Please select an option --
RESEARCH EQUIPMENT OUTSIDE ROOM?: -- Please select an option --
HAZARDOUS MATERIALS?: -- Please select an option --
FURNITURE?: -- Please select an option --
SPACE SHARED? IF YES, DESCRIBE ABOVE.: -- Please select an option --
PROJECT DEADLINE:

- Input ESTIMATED PROJECT TIME as a whole integer indicating the months from planning to close-out
- Input ESTIMATED PROJECT COST in whole dollars
- Select TYPE OF PROJECT dropdown menu



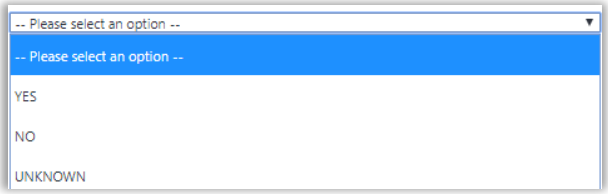
  - Select the option that best describes your project

- Select the CHANGE OF SPACE TYPES dropdown menu



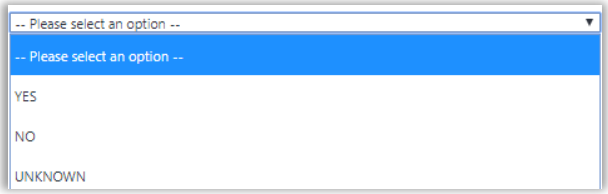
  - Select the applicable option

- Select the CHANGE OF ROOM NUMBERS dropdown menu



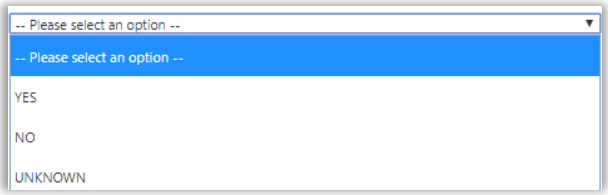
  - Select the applicable option

- Select the CHANGE OF OCCUPANCY COUNT dropdown menu



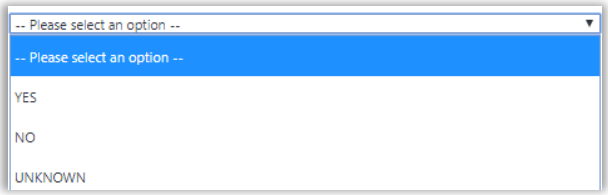
  - Select the applicable option

- Select the INCREASE OF MECHANICAL CAPACITY dropdown menu



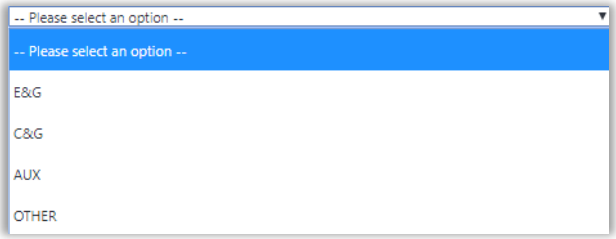
  - Select the applicable option

- Select the PROJECT FULLY FUNDED dropdown menu



  - Select the applicable option

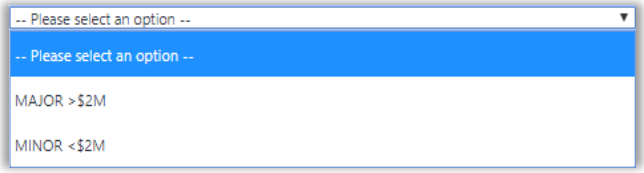
- Select the FUNDING SOURCE dropdown menu



  - Select the applicable option
    - E&G – Education & General

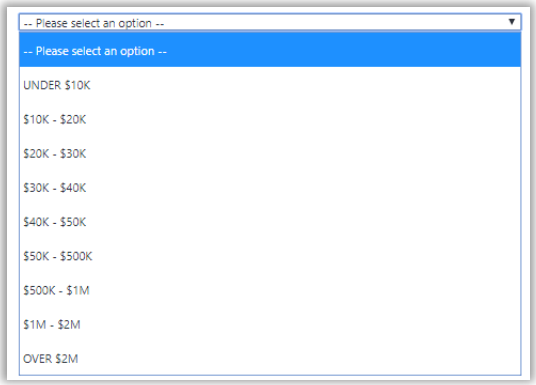
- C&G – Contracts & Grants
- AUX – Funds from Auxiliary organizations
- OTHER – Technology Fee, Donations, etc

- Select the MAJOR OR MINOR PROJECT dropdown menu



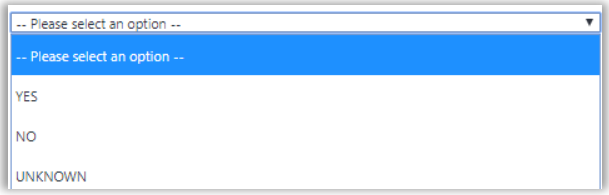
  - Select the applicable option

- Select the ESTIMATED PROJECT COST RANGE dropdown menu



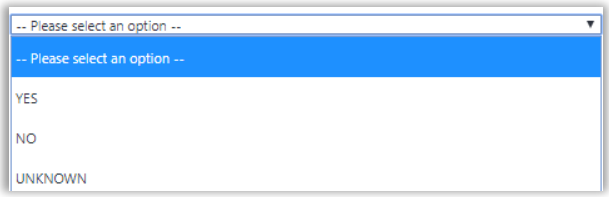
  - Select the range which corresponds to your ESTIMATED PROJECT COST

- Select the RESEARCH EQUIPMENT INSIDE ROOM dropdown menu



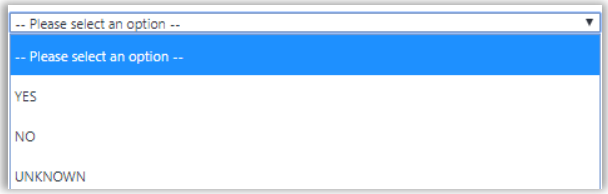
  - Select the applicable option

- Select the HAZARDOUS MATERIALS dropdown menu



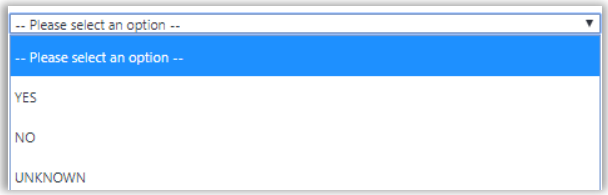
  - Select the applicable option

- Select the FURNITURE dropdown menu



  - Select the applicable option

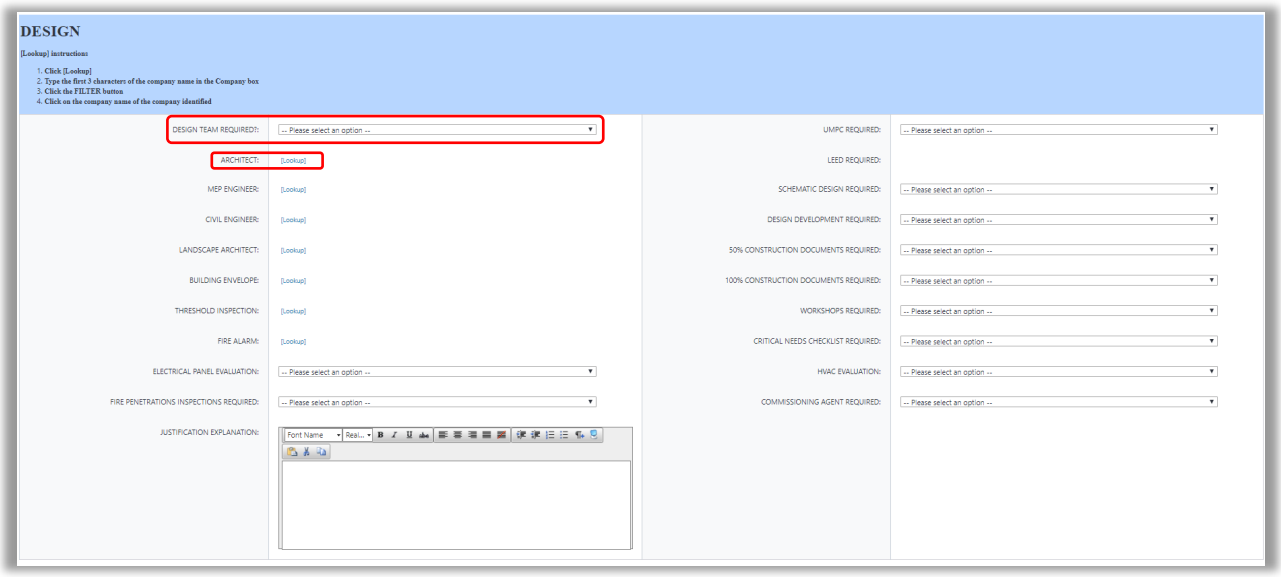
- Select the SPACE SHARED? IF YES, DESCRIBE ABOVE dropdown menu



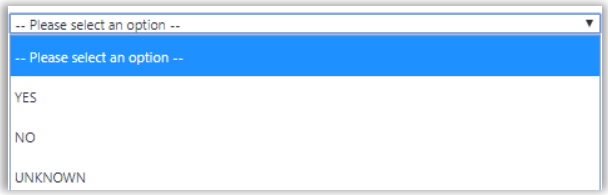
  - Select the applicable option
  - Notes on shared space are entered in the PROJECT DESCRIPTION

- Select the calendar icon next to the PROJECT DEADLINE field
  - Select the date you expect the project to close out according to the Project Schedule

From the 02 – Project Charter Process (PCP) screen – DESIGN section

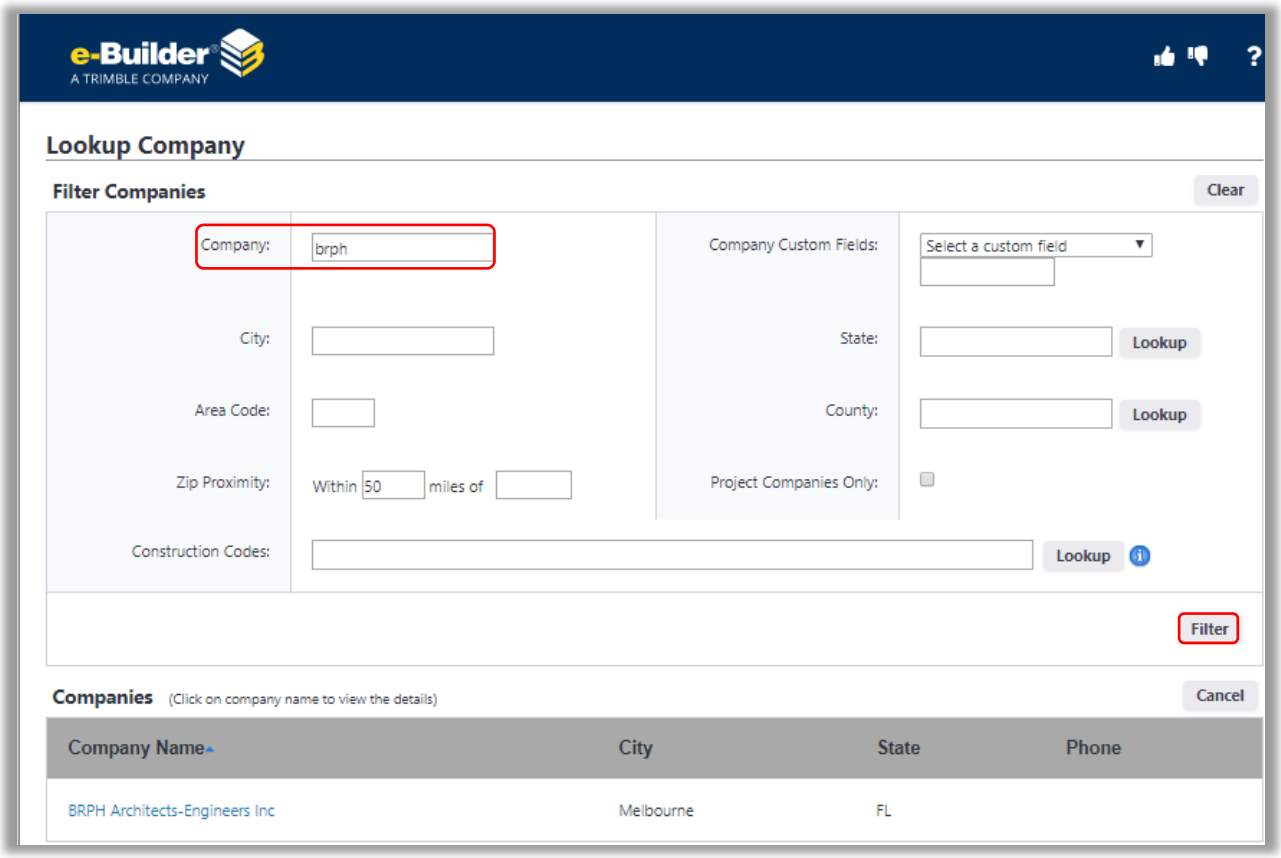


- Select the DESIGN TEAM REQUIRED dropdown menu



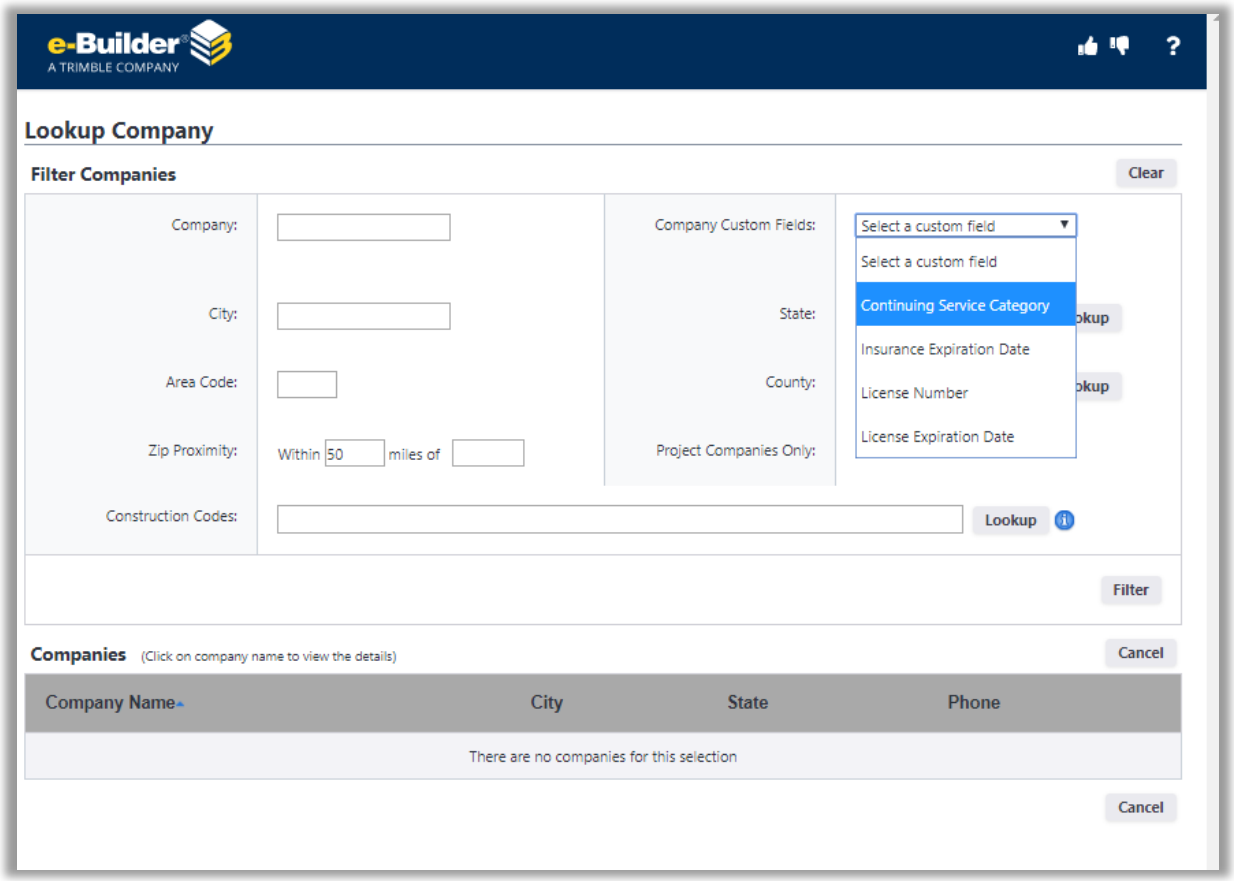
  - Select the applicable option
  - If YES is selected, complete the applicable information in the section. If NO, or UNKNOWN is selected, continue to the PROJECT COST REPORT section.
- Select the [Lookup] link next to any design professional category for which you wish to recommend a vendor

From the Lookup Company pop-up window



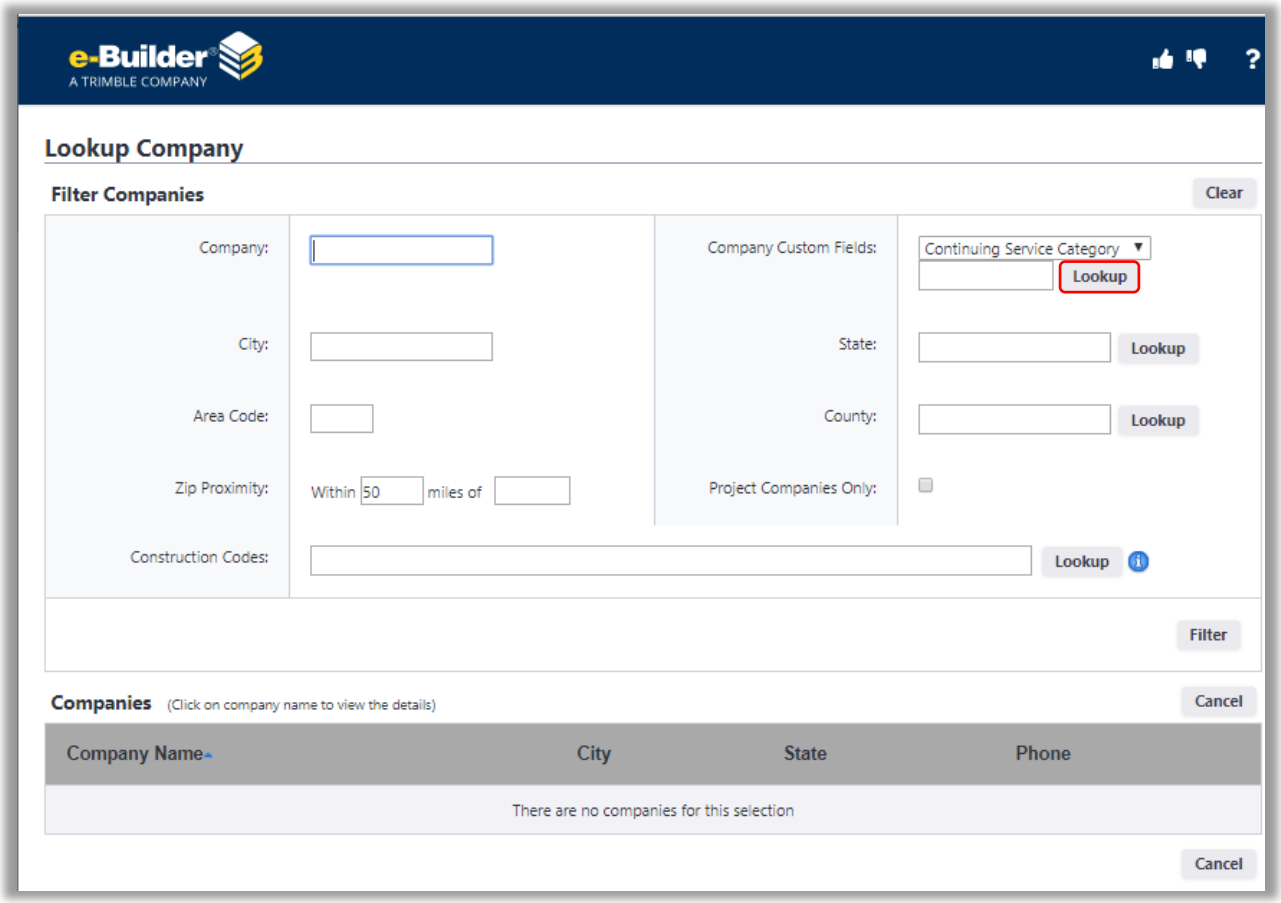
- Search for a specific design professional you wish to recommend
  - Input the name or a partial name into the Company field
  - Select the Filter button

From the Lookup Company pop-up window



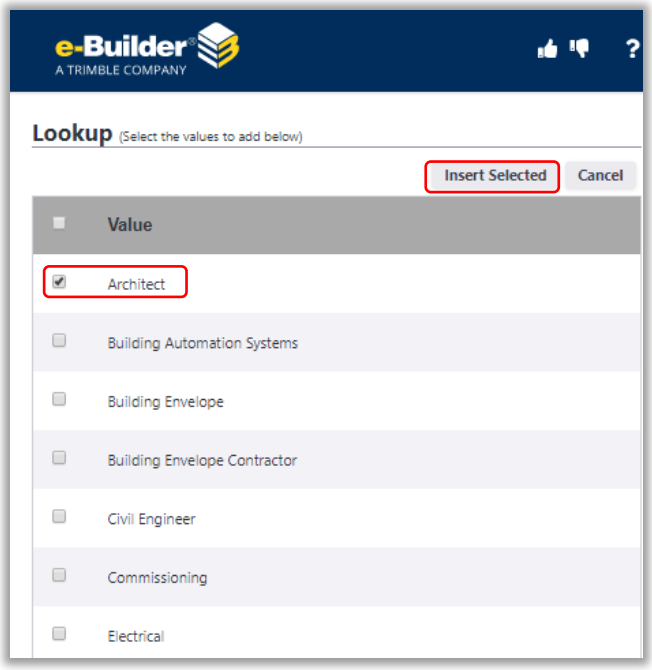
- Search for a category of vendors to select from
  - Select the Company Custom Fields dropdown menu
  - Select Continuing Service Category

From the Lookup Company pop-up window

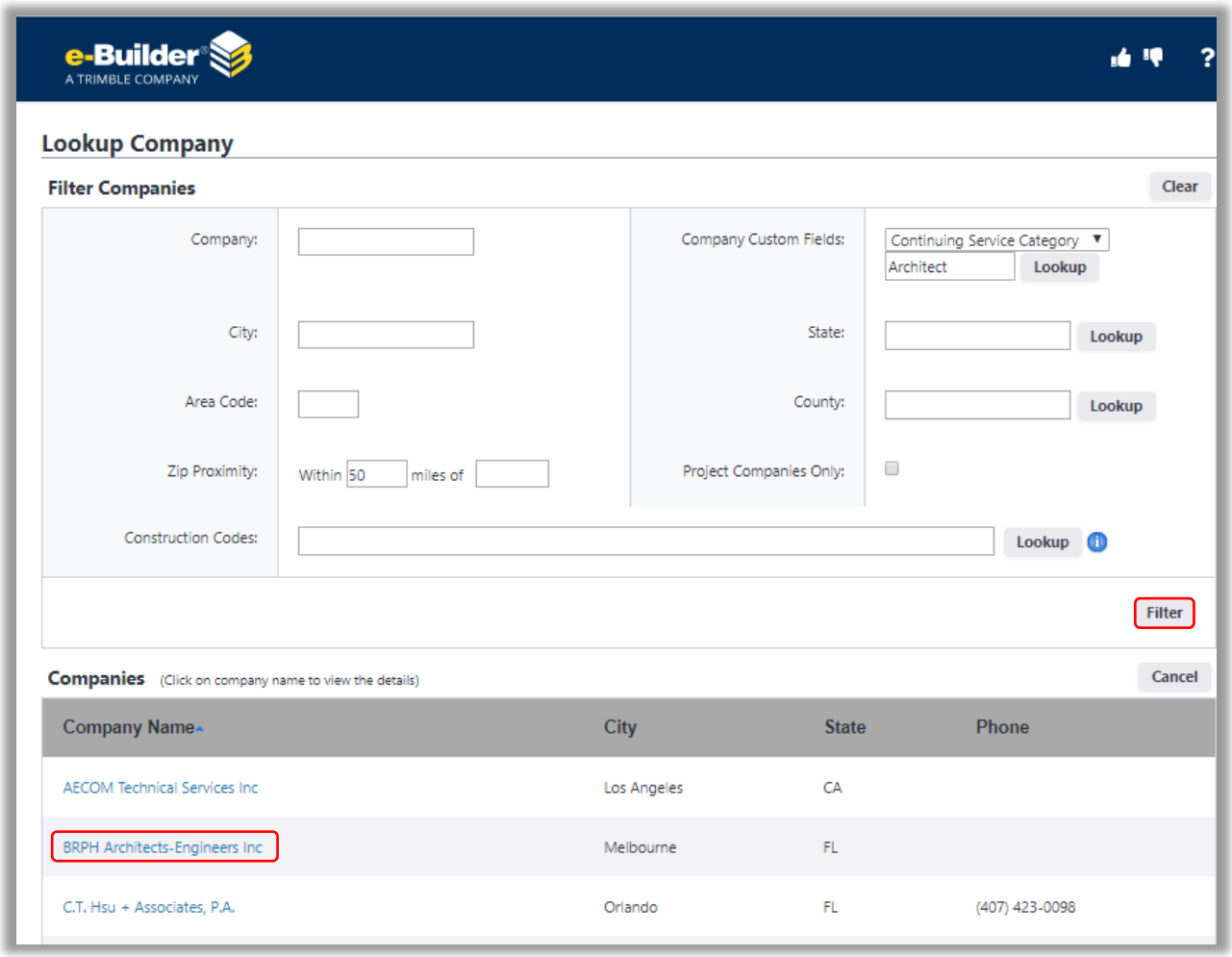


- Select the Lookup button underneath the field displaying Continuing Service Category

From the Lookup pop-up window

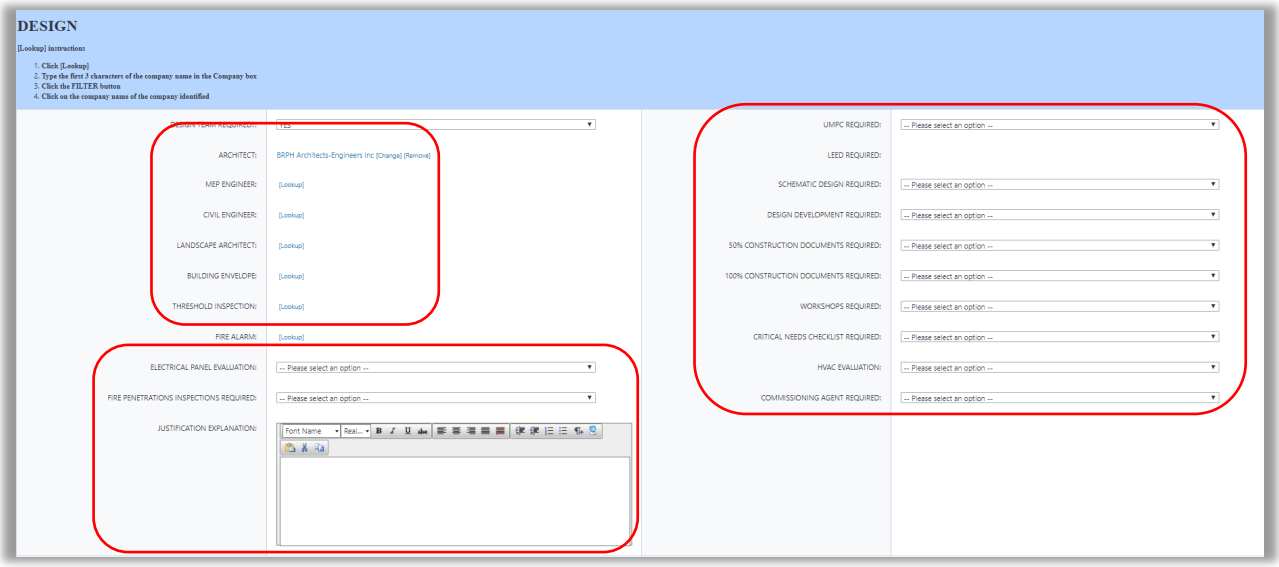


- Select the checkbox next to the Value you wish to filter by
- Select the Insert Selected button

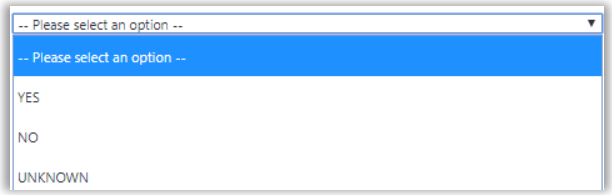


- Select the Filter button
- Select your recommended vendor from the results

From the 02 – Project Charter Process (PCP) screen – DESIGN section

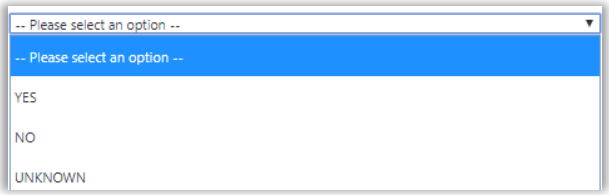


- You will see your selected design professional displayed
- Repeat this process for any other design professionals you wish to recommend
- Select the ELECTRICAL PANEL EVALUATION dropdown menu



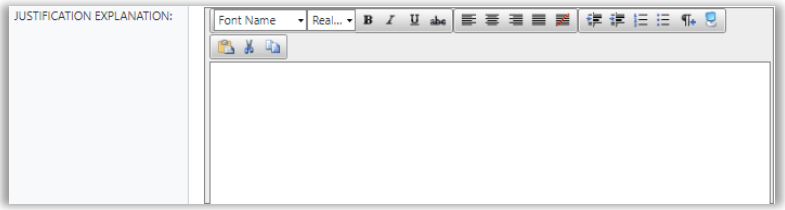
  - Select the applicable option

- Select the FIRE PENETRATIONS INSPECTIONS REQUIRED dropdown menu



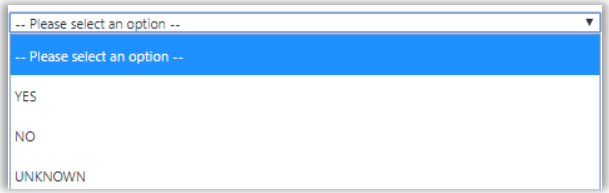
  - Select the applicable option

- Input why you are recommending the design professional(s) in the JUSTIFICATION EXPLANATION text field



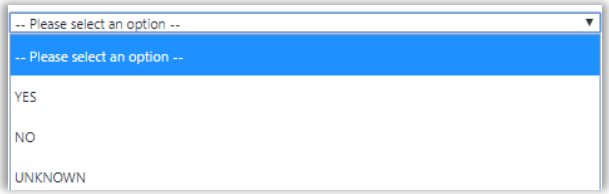
  - *It can be helpful to create and save statements for a number of common reasons in a separate file, from which you can then copy and paste a prepared statement into this field, modifying the statement verbiage if needed*

- Select the UMPC REQUIRED dropdown menu



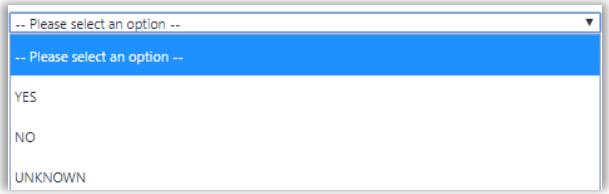
  - Select the applicable option

- Select the SCHEMATIC DESIGN REQUIRED dropdown menu



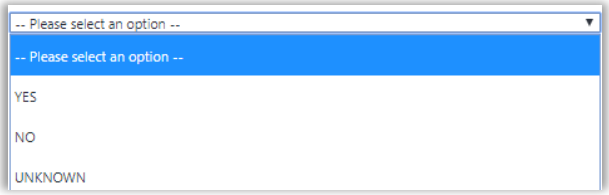
  - Select the applicable option

- Select the DESIGN DEVELOPMENT REQUIRED dropdown menu



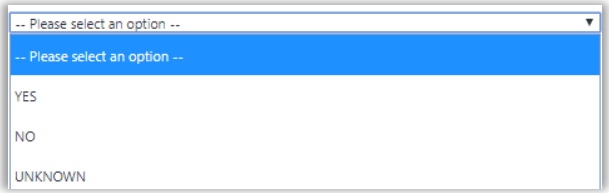
  - Select the applicable option

- Select the 50% CONSTRUCTION DOCUMENTS REQUIRED dropdown menu



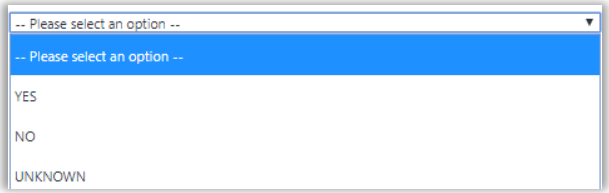
  - Select the applicable option

- Select the 100% CONSTRUCTION DOCUMENTS REQUIRED dropdown menu



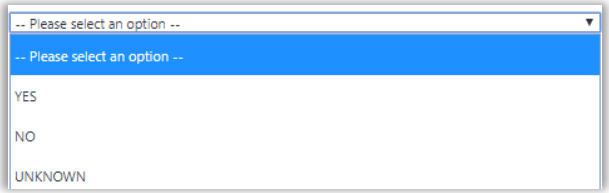
  - Select the applicable option

- Select the WORKSHOPS REQUIRED dropdown menu



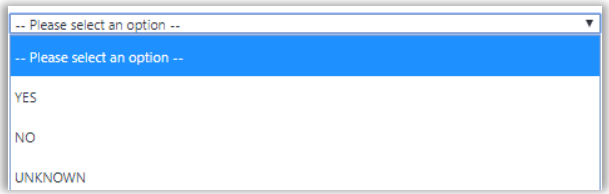
  - Select the applicable option

- Select the CRITICAL NEEDS CHECKLIST REQUIRED dropdown menu



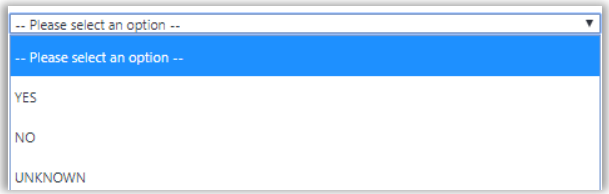
  - Select the applicable option

- Select the HVAC EVALUATION dropdown menu



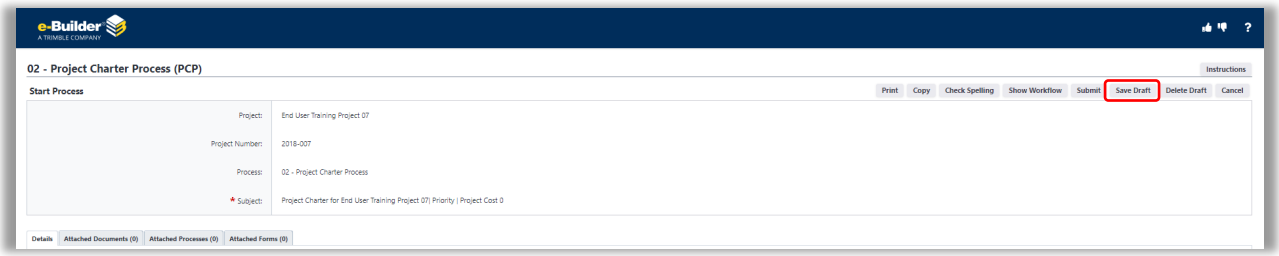
  - Select the applicable option

- Select the COMMISSIONING REQUIRED dropdown menu



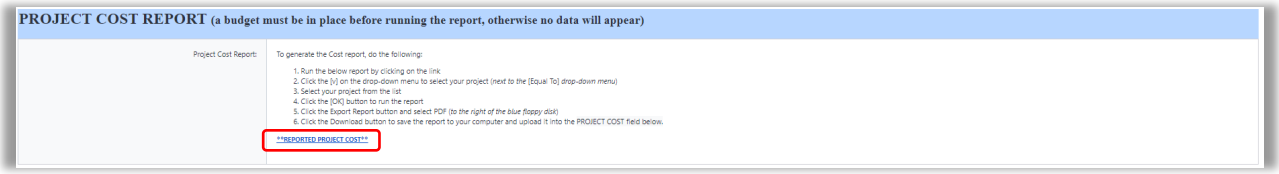
  - Select the applicable option

From the 02 – Project Charter process (PCP) screen



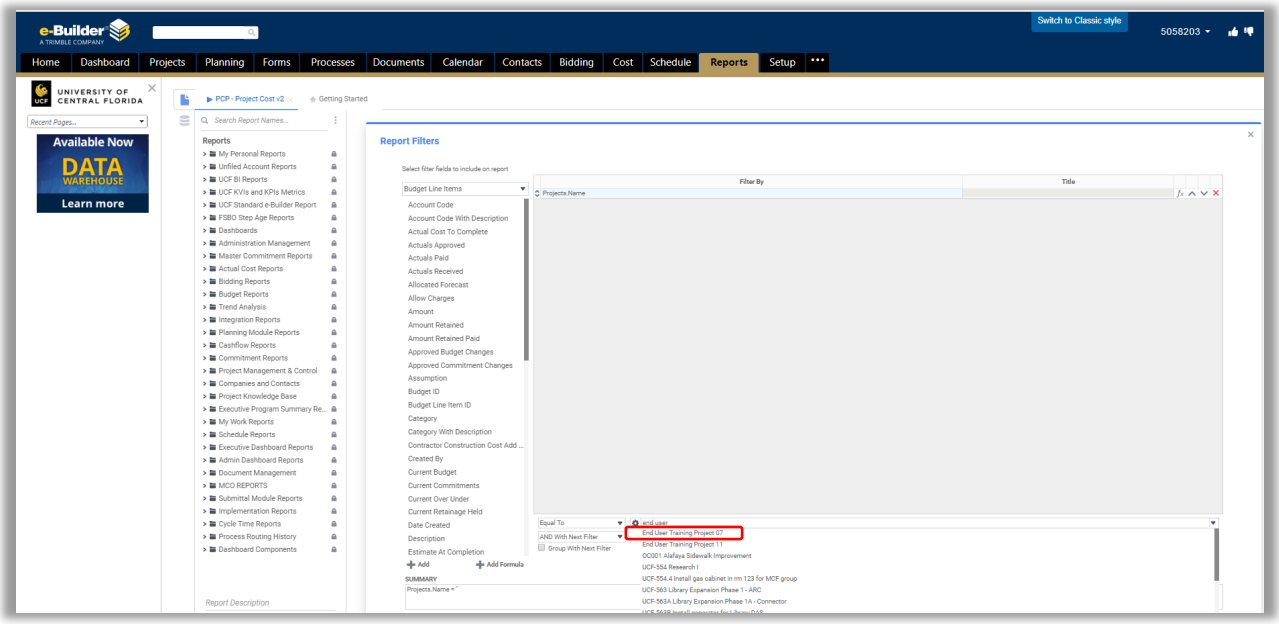
- Select the Save Draft button
  - *It is critical to save your work here as the next step of the process will cause you to navigate away from this page --- all unsaved work will be lost.*

From the 02 – Project Charter Process (PCP) screen – PROJECT COST REPORT section



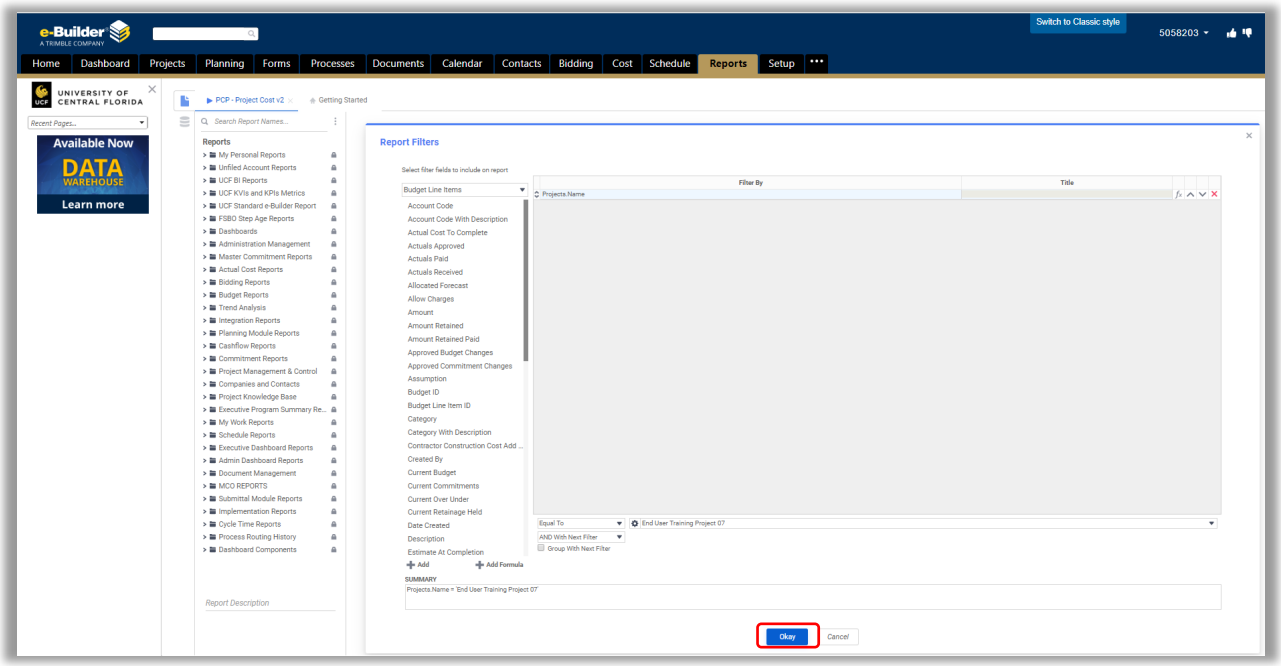
- Ensure the Project Budget you created in the Cost Module is approved
- Select the **REPORTED PROJECT COST** link, which will take you the Reports Menu

From the Reports menu



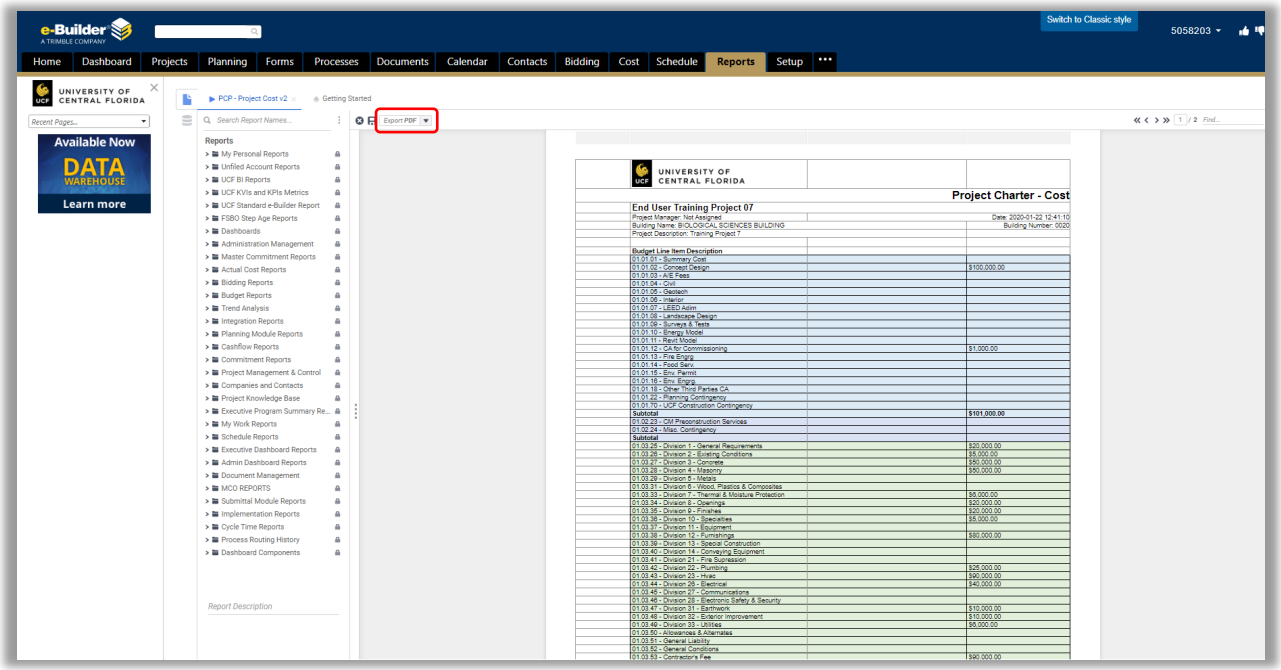
- Input key words of the Project Name into the unlabeled dropdown menu to the right of the field displaying Equal To
- Select the dropdown menu now containing these key words
- Select the project, for which you are creating the Project Charter

From the Reports Menu



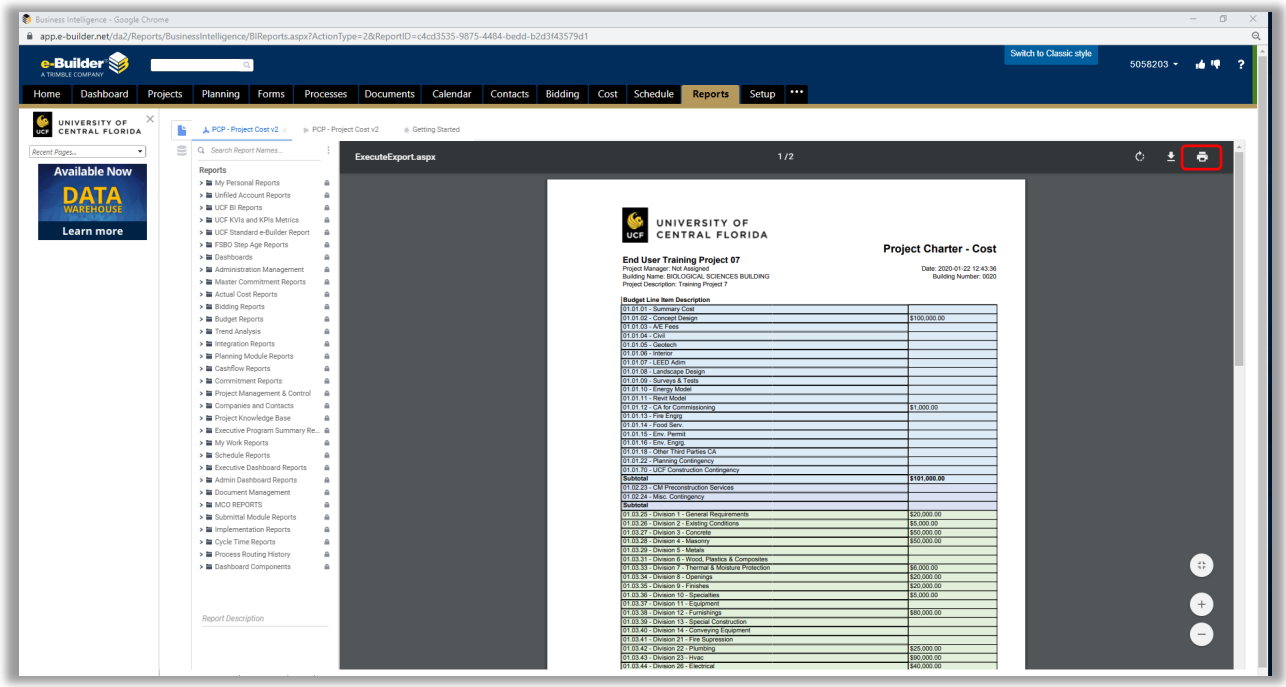
- Select the Okay button

From the Reports Menu



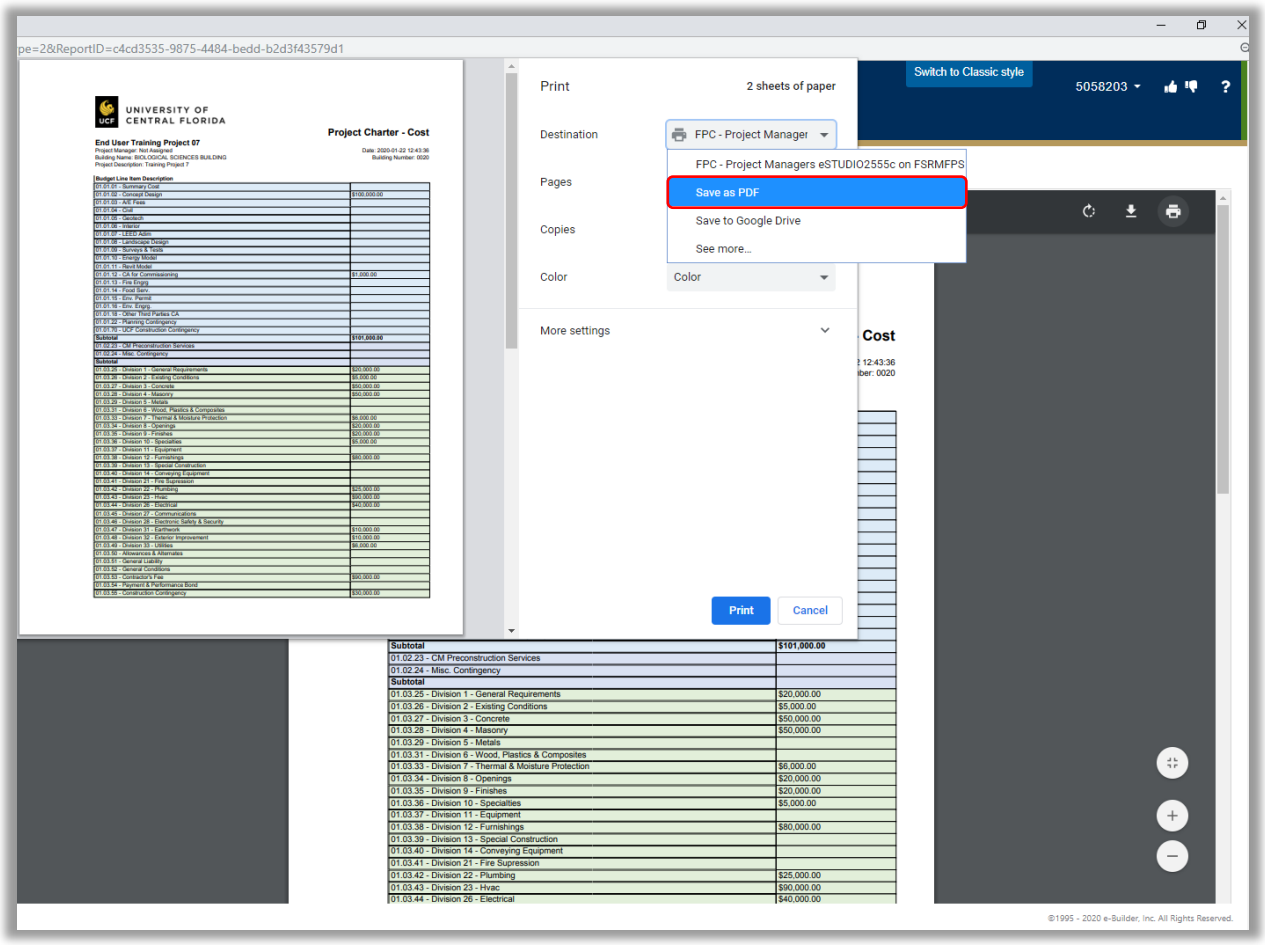
- Select the Export PDF button

From the Reports Menu



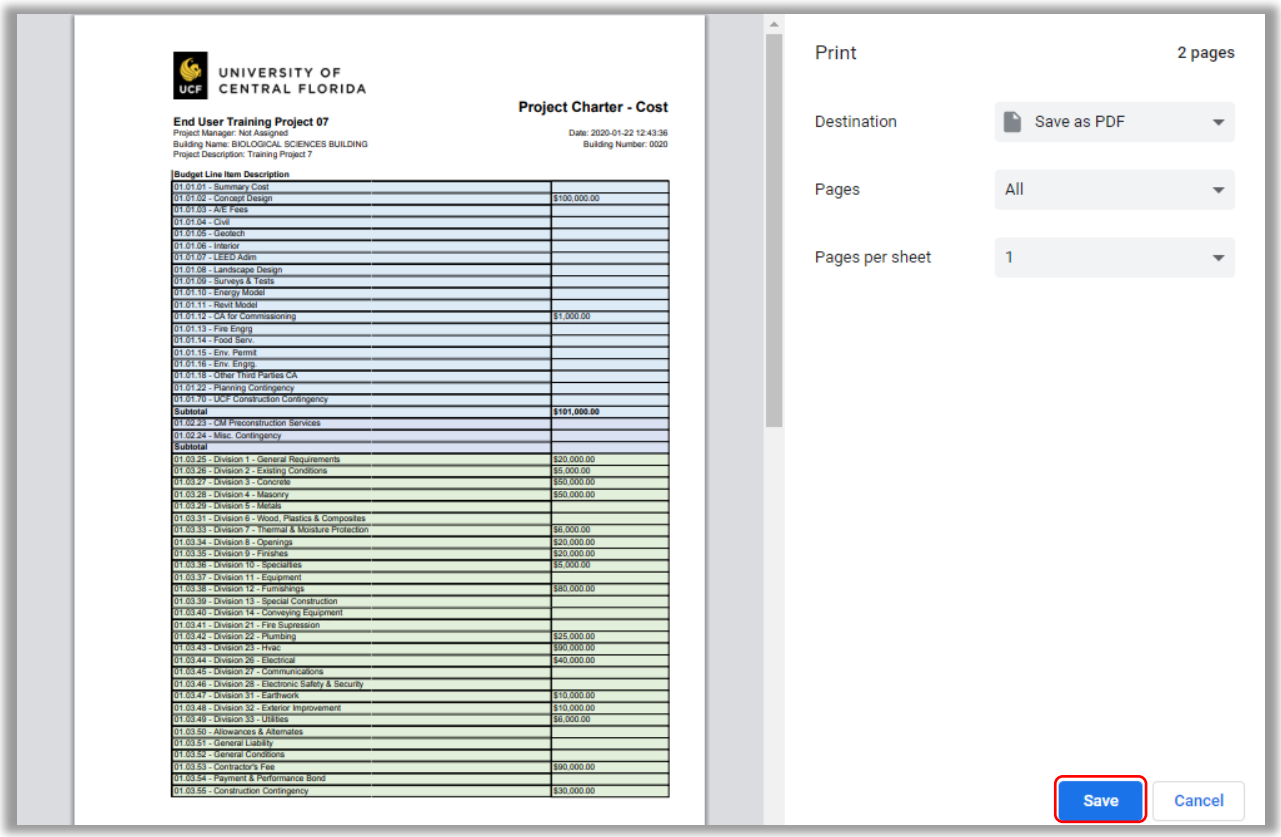
- Select the print icon

From the Print pop-up window



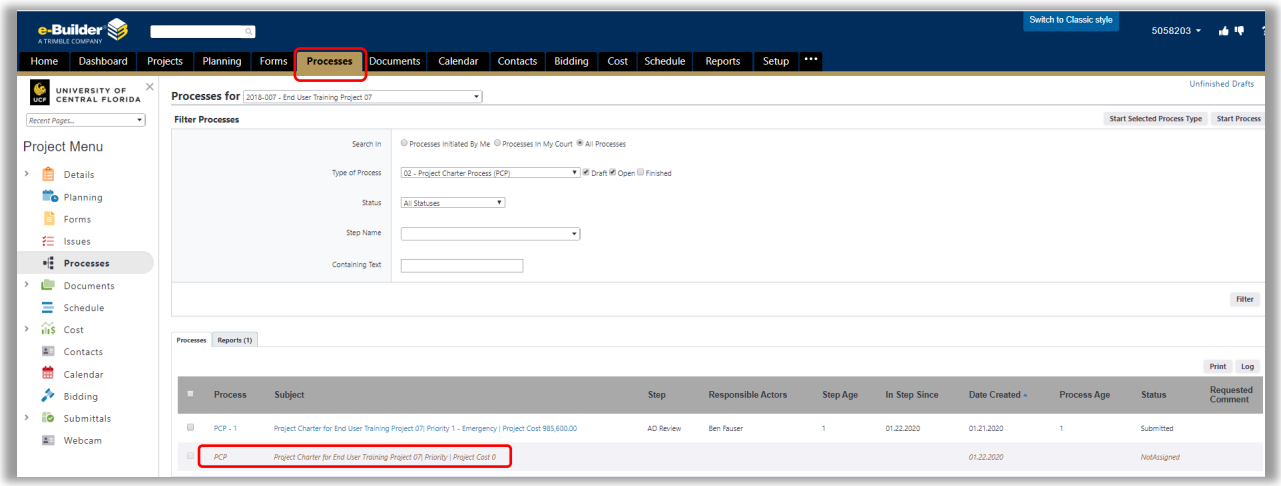
- Select the Destination dropdown menu, then select the Save as PDF option

From the Print pop-up window



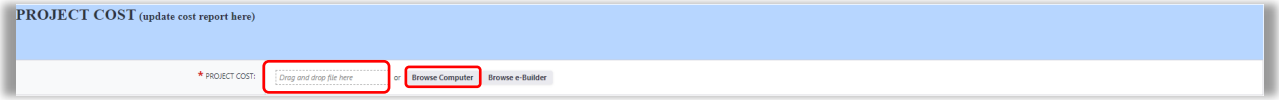
- Select the Save button
- Select the file directory on your computer, in which you wish to save this document
- Change the File name of the document to, Project Name + “Project Budget” + MMDDYYYY
- Save the document

In e-Builder, navigate back to the Process menu



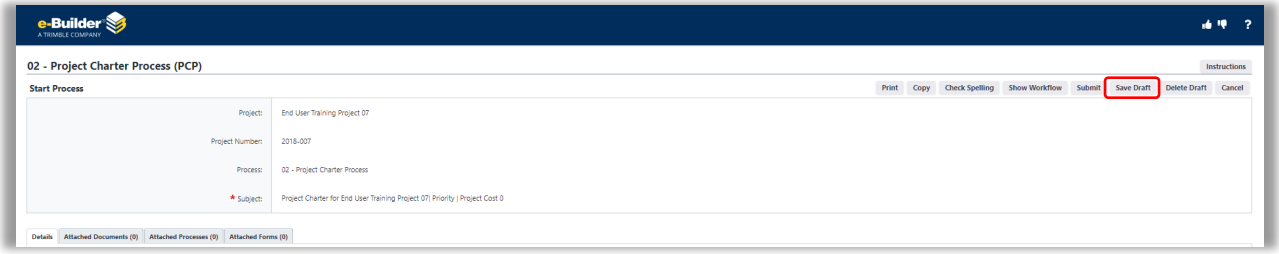
- Select the in-progress Project Charter process you are working with

From the 02 – Project Charter Process (PCP) screen – PROJECT COST section



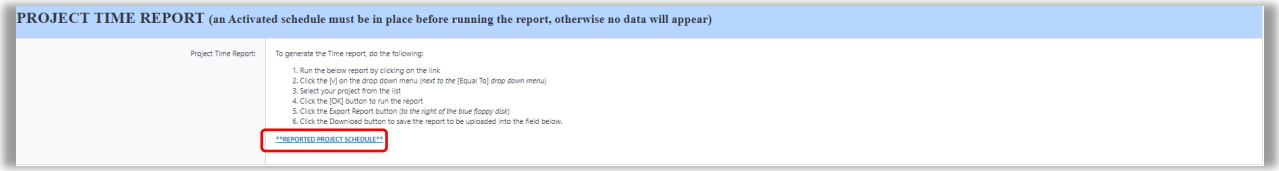
- Drag and drop the file you just created into the PROJECT COST field
- Or, select the Browse Computer button and select the file from the directory on your computer in which you saved the estimated project budget

From the 02 – Project Charter process (PCP) screen



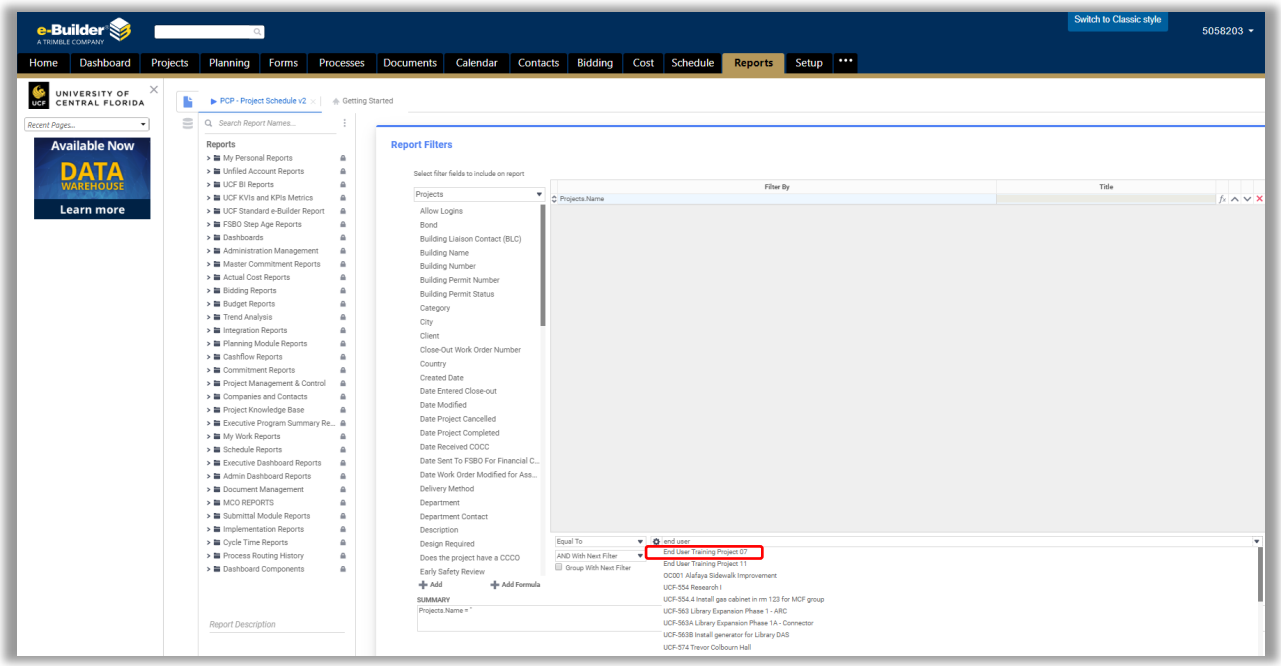
- Select the Save Draft button
  - *It is critical to save your work here as the next step of the process will cause you to navigate away from this page --- all unsaved work will be lost.*

From the 02 – Project Charter Process (PCP) screen – PROJECT TIME REPORT section



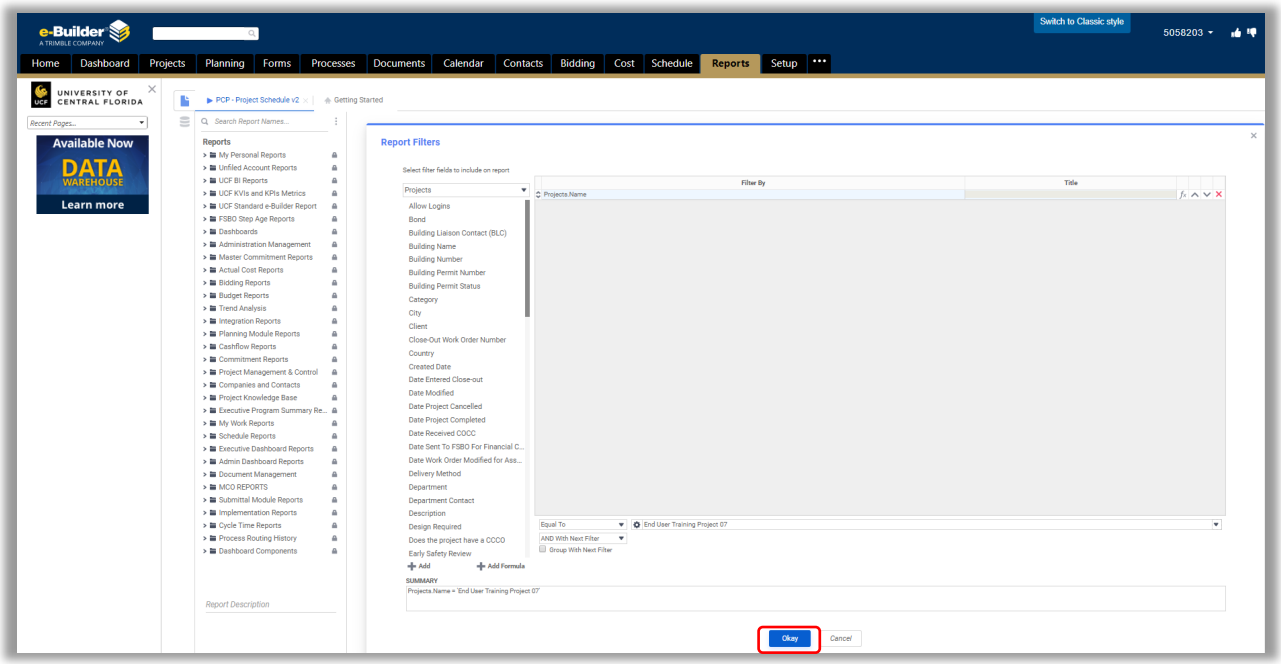
- Ensure you have completed the pre-requisite of creating the Project Schedule in the Schedule Module
- Select the **REPORTED PROJECT SCHEDULE** link, which will take you the Reports Menu

From the Reports menu



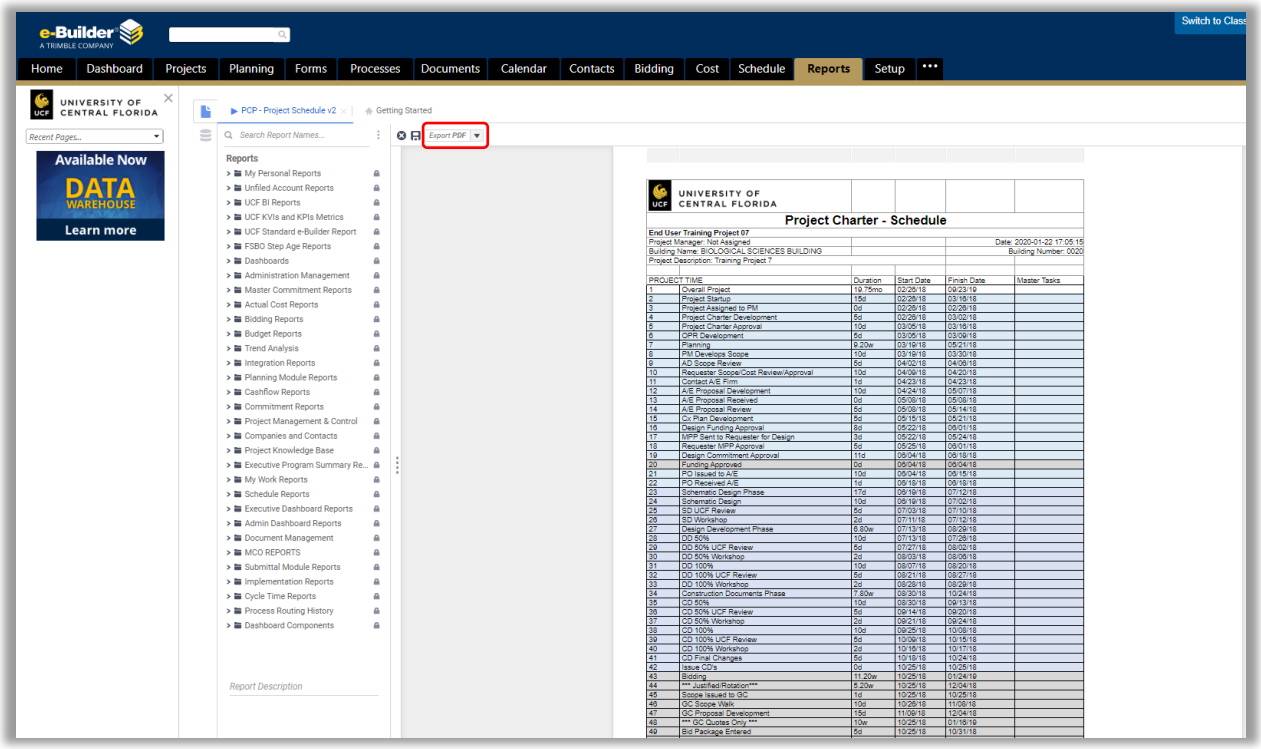
- Input key words of the Project Name into the unlabeled dropdown menu to the right of the field displaying Equal To
- Select the dropdown menu now containing these key words
- Select the project, for which you are creating the Project Charter

From the Reports Menu



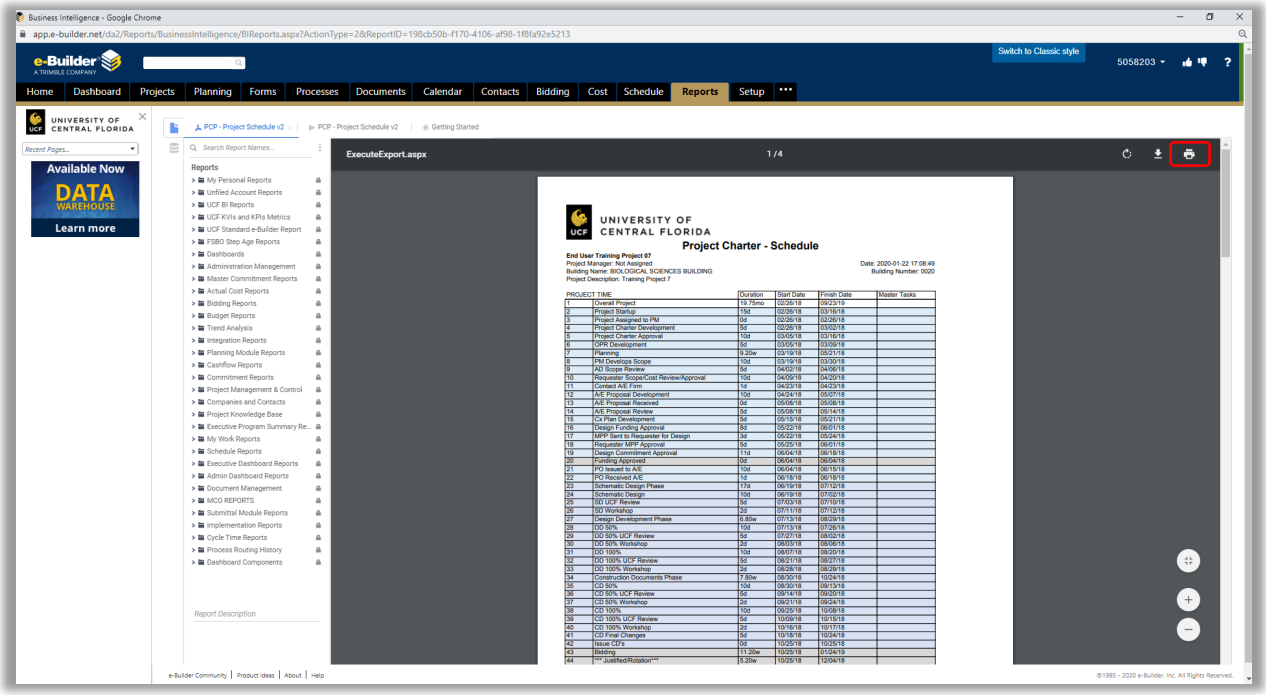
- Select the Okay button

From the Reports Menu



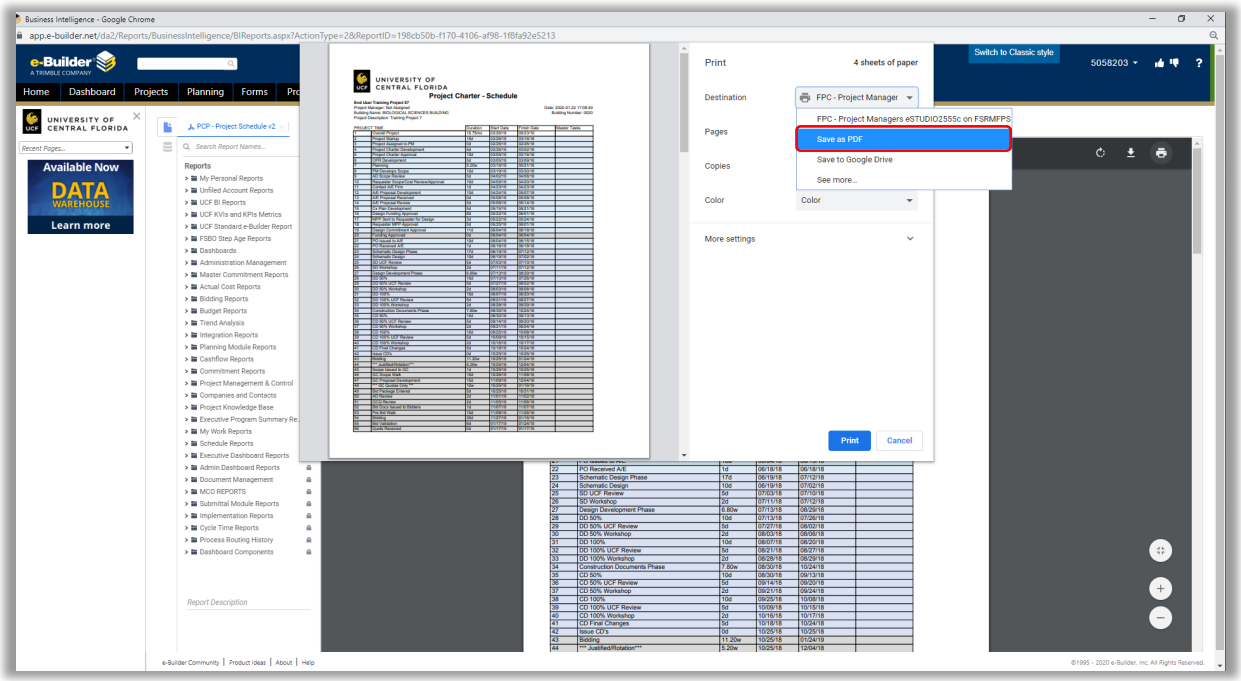
- Select the Export PDF button

From the Reports Menu



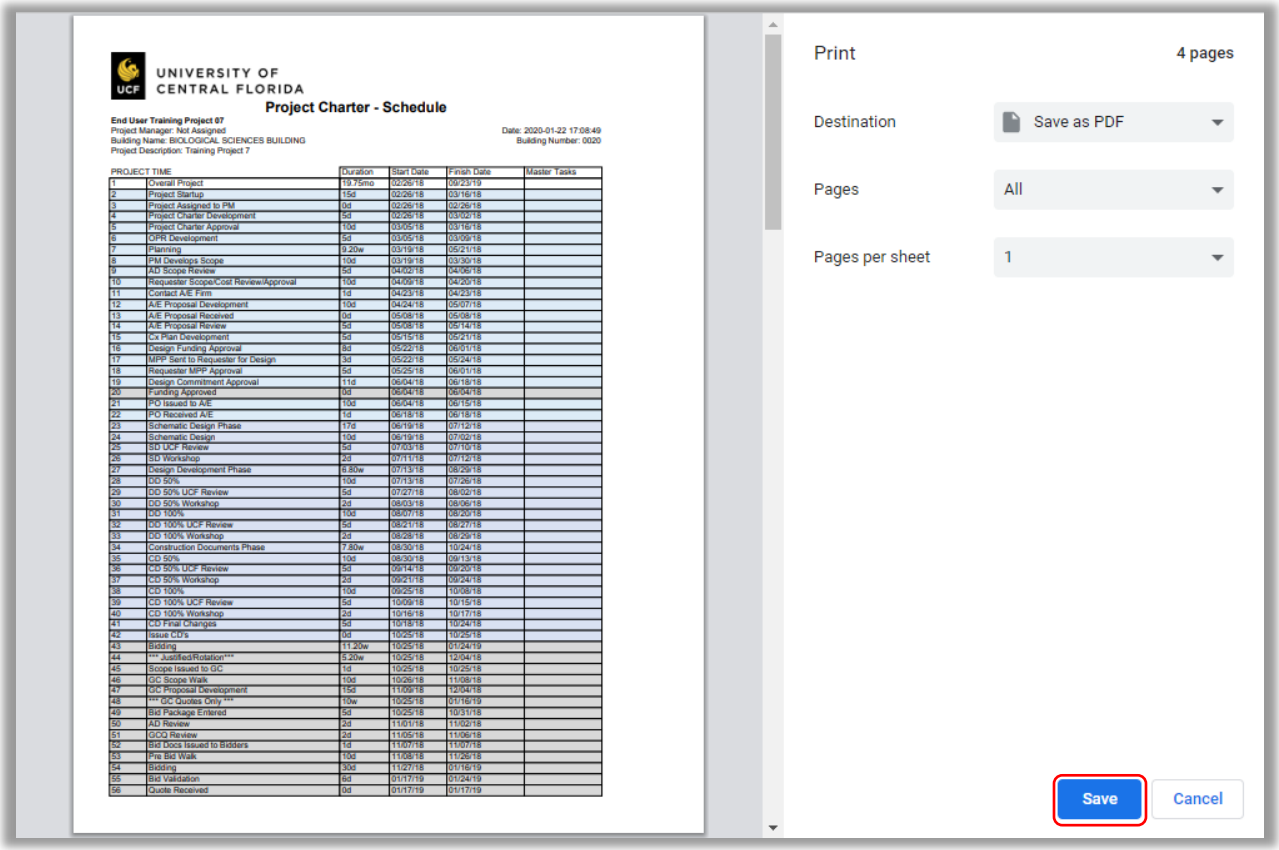
- Select the print icon

From the Print pop-up window



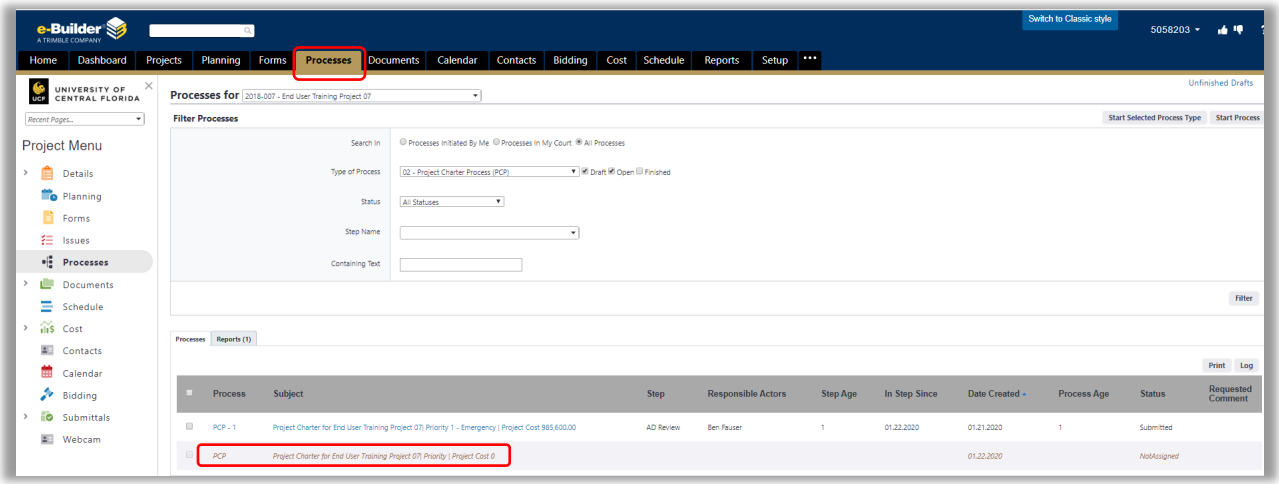
- Select the Destination dropdown menu, then select the Save as PDF option

From the Print pop-up window



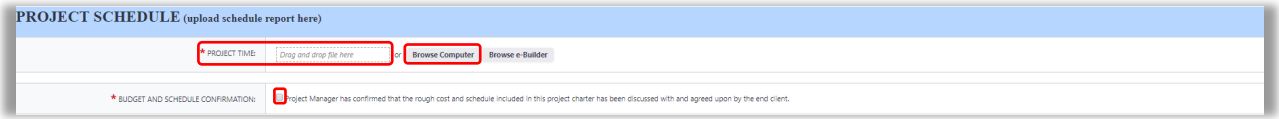
- Select the Save button
- Select the file directory on your computer, in which you wish to save this document
- Change the File name of the document to, Project Name + “Project Schedule” + MMDDYYYY
- Save the document

In e-Builder, navigate back to the Process menu



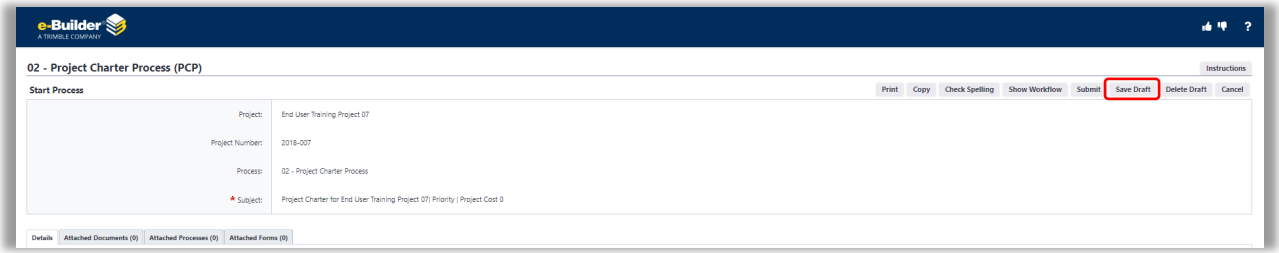
- Select the in-progress Project Charter process you are working with

From the 02 – Project Charter Process (PCP) screen – PROJECT SCHEDULE section



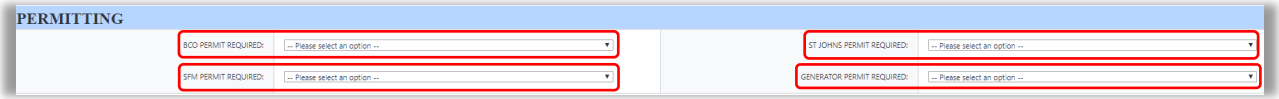
- Drag and drop the file you just created into the PROJECT TIME field
- Or, select the Browse Computer button and select the file from the directory on your computer in which you saved the estimated project schedule
- Select the BUDGET AND SCHEDULE CONFIRMATION checkbox

From the 02 – Project Charter process (PCP) screen

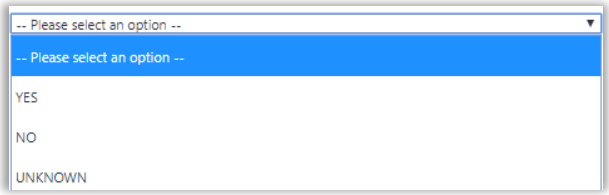


- Select the Save Draft button
  - *It is advisable to save your work here as all unsaved work will be lost if you navigate away from the screen.*

From the 02 – Project Charter Process (PCP) screen – PERMITTING section

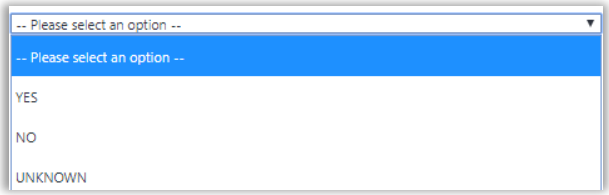


- Select the BCO PERMIT REQUIRED dropdown menu



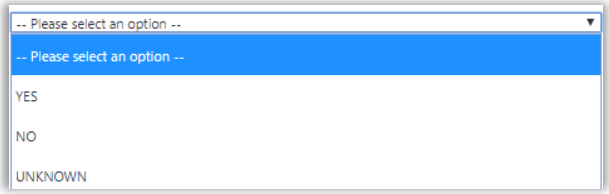
  - Select the applicable option

- Select SFM PERMIT REQUIRED dropdown menu



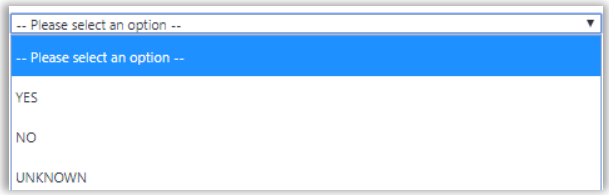
  - Select the applicable option

- Select ST JOHS PERMIT REQUIRED dropdown menu



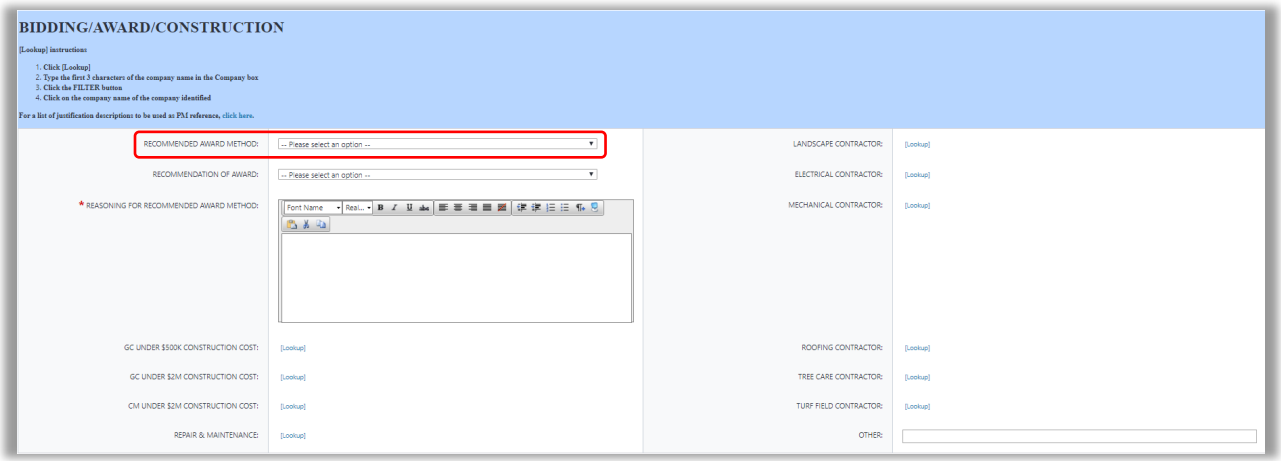
  - Select the applicable option

- Select GENERATOR PERMIT REQUIRED dropdown menu

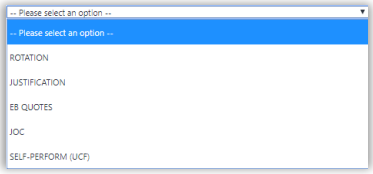


  - Select the applicable option

From the 02 – Project Charter Process (PCP) screen – BIDDING/AWARD/CONSTRUCTION section

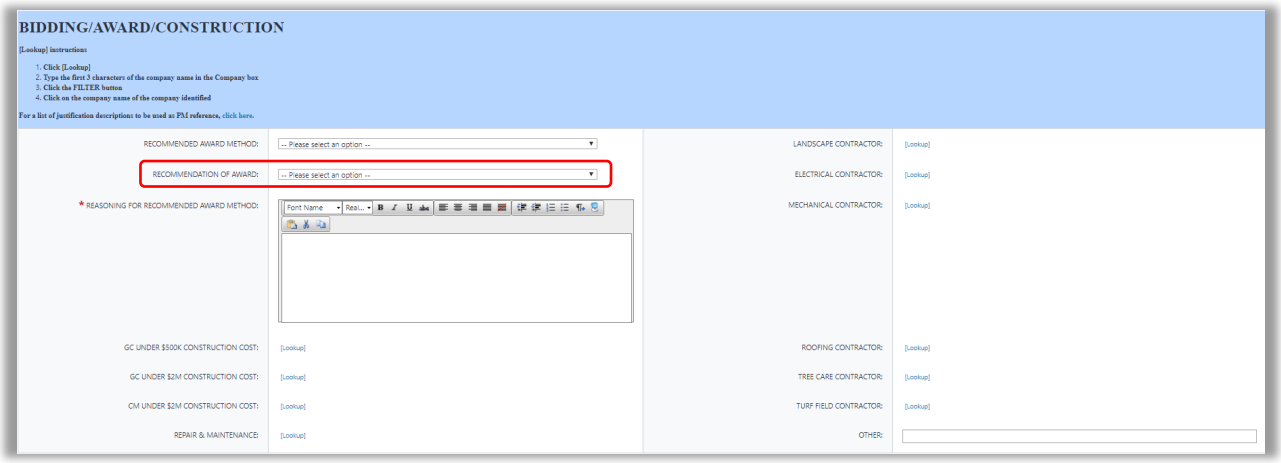


- Select the RECOMMENDED AWARD METHOD dropdown menu

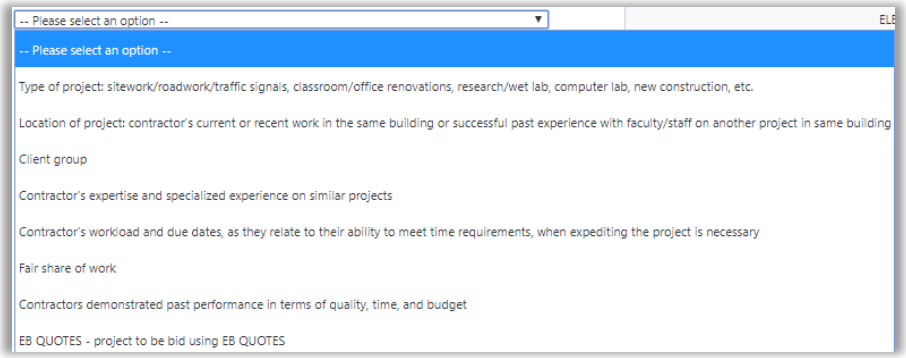


  - Select the award method you are recommending
    - ROTATION – Next company up for a project in a pool of Continuing Service Vendors
    - JUSTIFICATION – Vendor selected due to specific considerations related to the project
    - EB QUOTES – Open bid among pool of relevant Continuing Service Vendors
    - JOC – Job Order Contract for projects under $500K
    - SELF-PERFORM – Recommendation that UCF in-house personnel complete work

From the 02 – Project Charter Process (PCP) screen – BIDDING/AWARD/CONSTRUCTION section

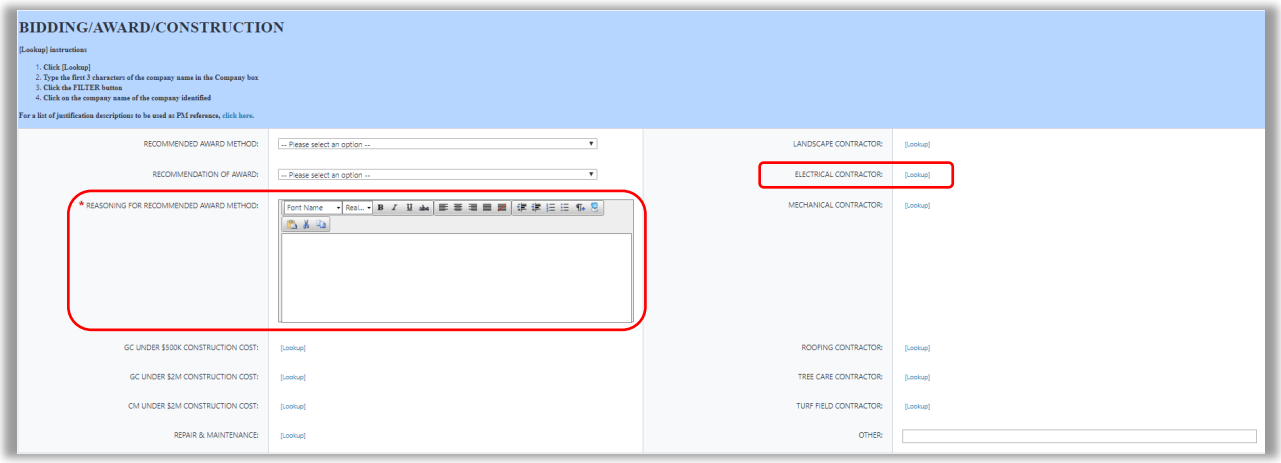


- Select the RECOMMENDATION OF AWARD dropdown menu



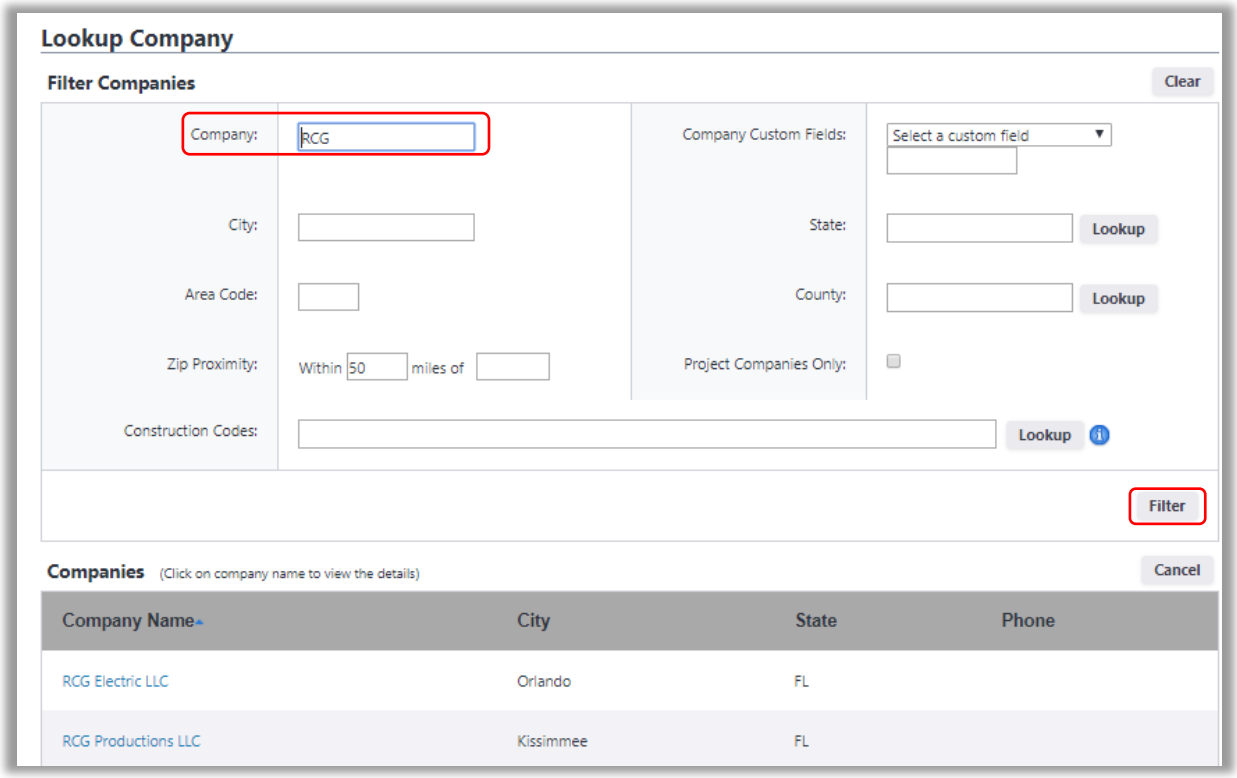
- Select the option that best aligns with your AWARD METHOD selection

From the 02 – Project Charter Process (PCP) screen – BIDDING/AWARD/CONSTRUCTION section



- Input why you are recommending the award method in the REASON FOR RECOMMENDED AWARD METHOD text field
    - *It can be helpful to create and save statements for a number of common reasons in a separate file, from which you can then copy and paste a prepared statement into this field, modifying the statement verbiage if needed*
- If specific vendors will be recommended, select the [Lookup] link next to a category of vendor you wish to recommend.

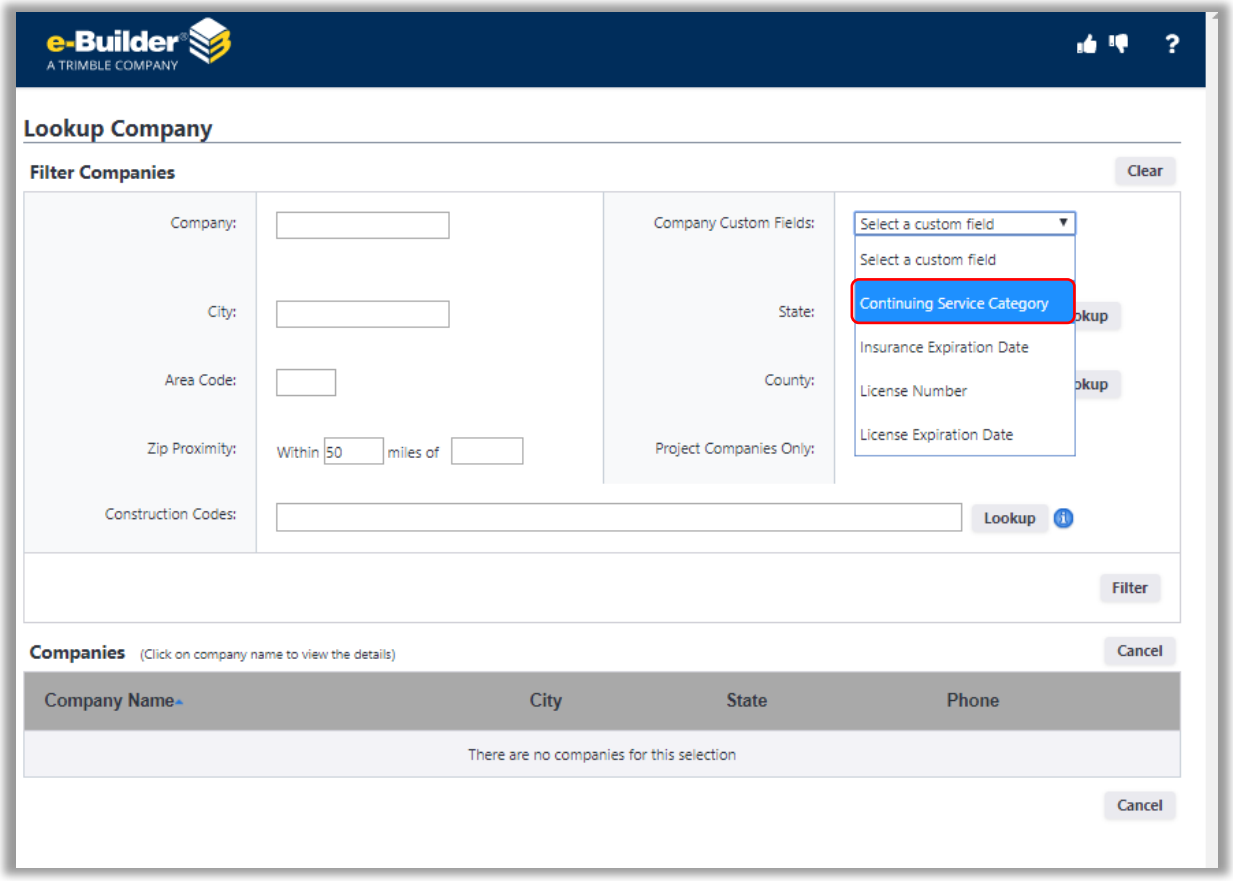
From the Lookup Company pop-up window



- Search for a specific vendor you wish to recommend

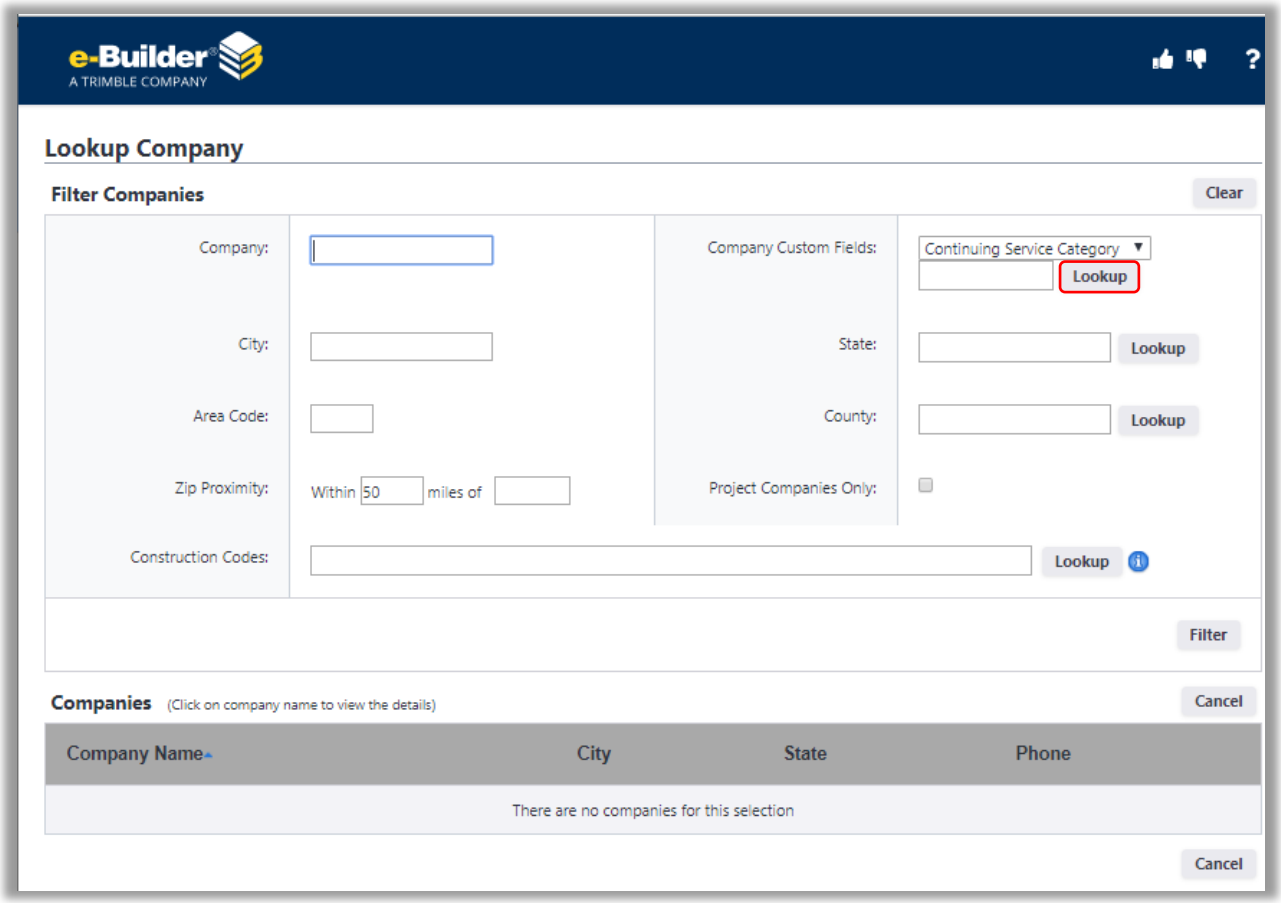
- Input the name or a partial name into the Company field, then select the Filter button

From the Lookup Company pop-up window



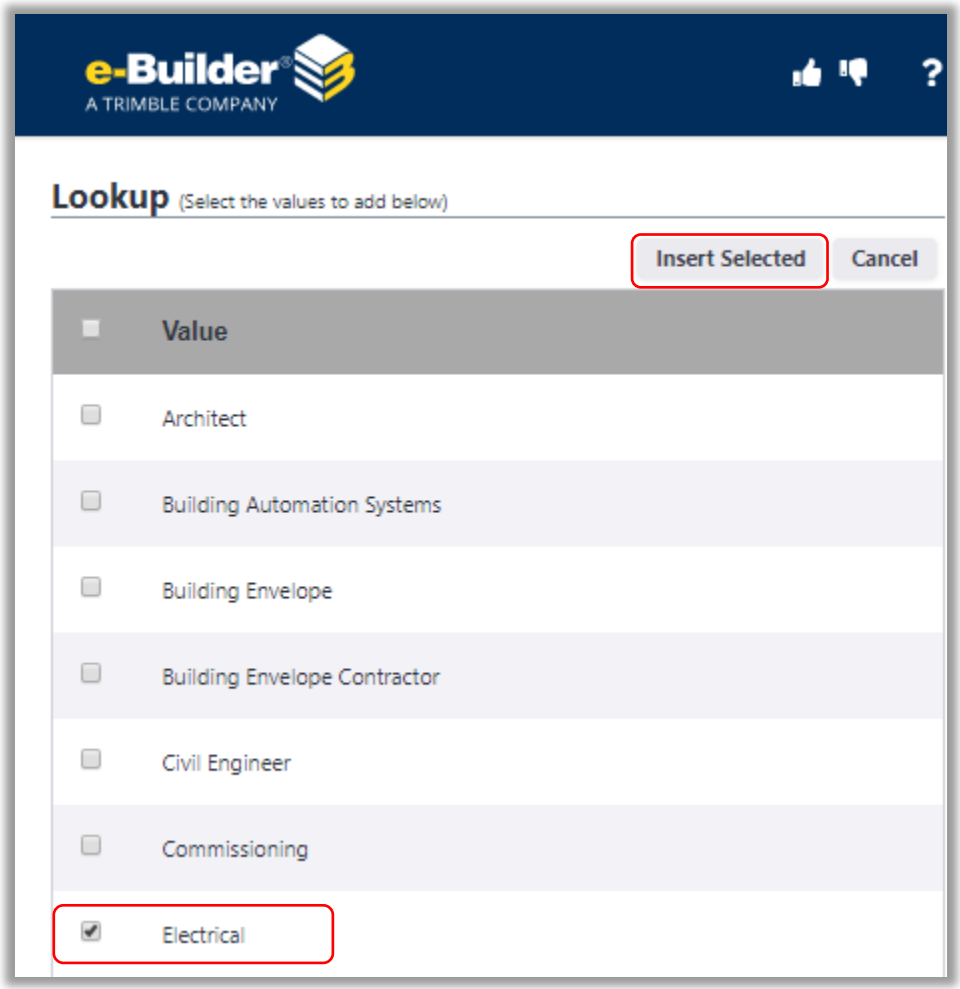
- Search for a category of vendors to select from
  - Select the Company Custom Fields dropdown menu
  - Select Continuing Service Category

From the Lookup Company pop-up window



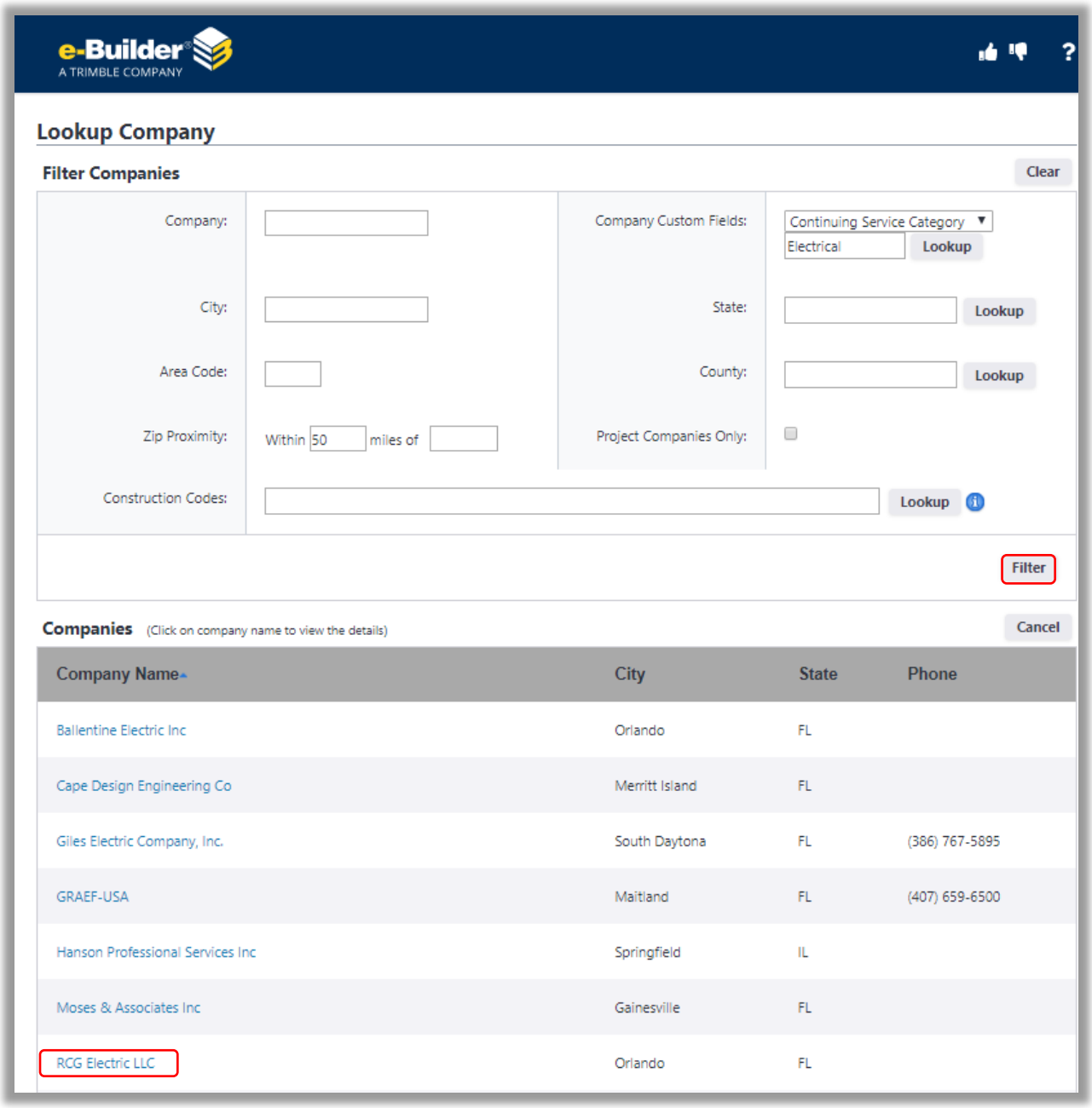
- Select the Lookup button underneath the field displaying Continuing Service Category

From the Lookup pop-up window



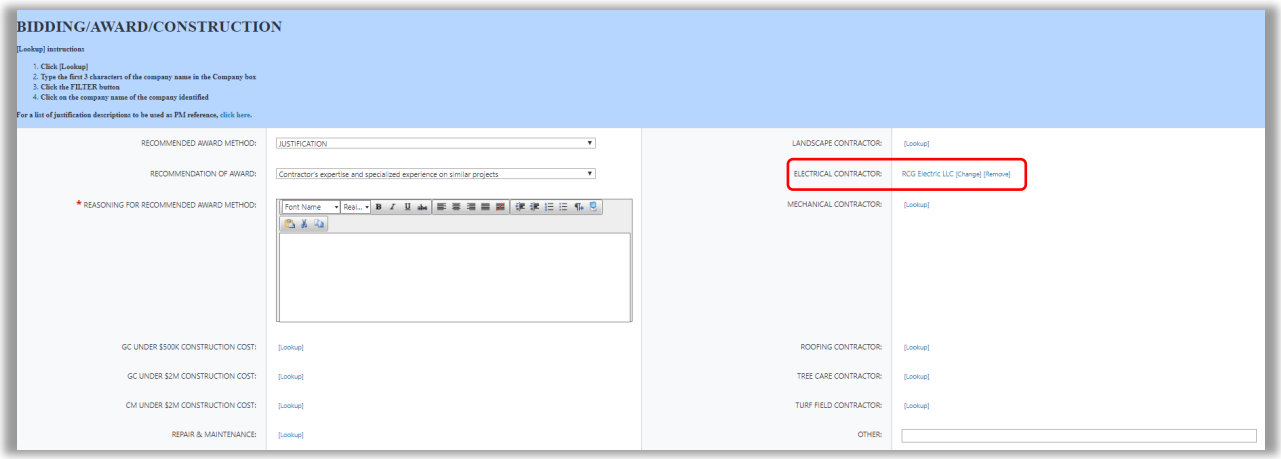
- Select the checkbox next to the Value you wish to filter by
- Select the Insert Selected button

From the Lookup Company pop-up window



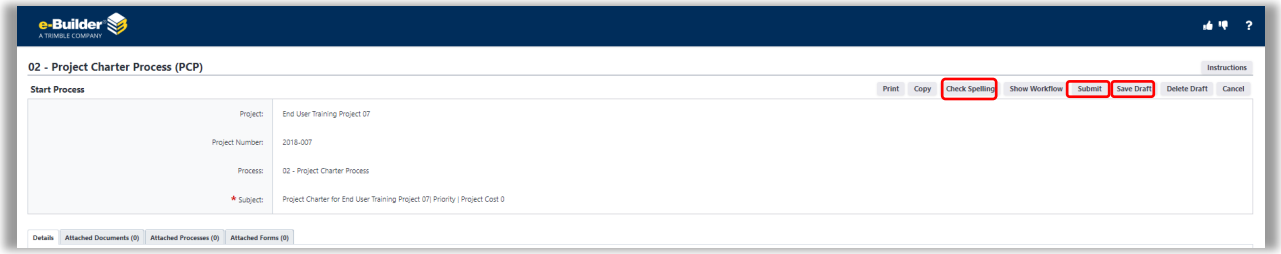
- Select the Filter button
- Select your recommended vendor from the results

From the 02 – Project Charter Process (PCP) screen – BIDDING/AWARD/CONSTRUCTION section



- You will see your selected vendor displayed
- Repeat this process for any other vendors you wish to recommend

From the 02 – Project Charter process (PCP) screen

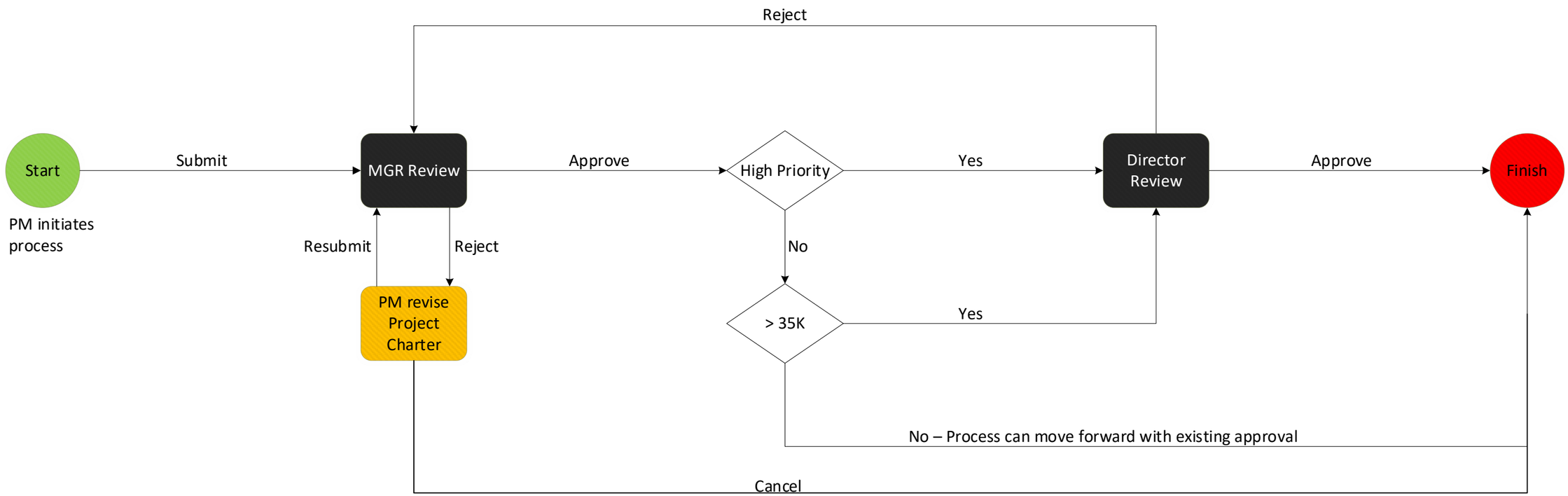


- Select the Check Spelling button and correct any issues
- Select the Save Draft button
    - *It is advisable to save your work here as all unsaved work will be lost if you navigate away from the screen.*
- Select the Submit button to send the Project Charter to the FP&C MGR for review

Congratulations! You have created an e-Builder Project Charter.

The MGR will approve or return the Project Charter with comments.

02 – Project Charter Process (PCP)



LEGEND

MGR – Manager, Facilities Planning
PM – Project Manager