Project Request Process Narrative (Minor Projects)

Purpose

The purpose of the Project Request Process is to provide a mechanism to campus clients, which allows them to request services from FP&C. The process is designed to ensure the Project Request contains the information needed for FP&C to understand what is being requested, allow Space Administration to vet the request, as well as, other university experts depending on the scope of the request, and to ensure start-up funding is available. The goal of the Project Request Process is to ensure quality, well-understood, supported projects are assigned to FP&C Project Managers who will be able to guide the projects to successful conclusions.

Initiator

A Project Request can be initiated by anyone with a valid UCF Network Identification Number (NID) using the Click Here to Submit a Minor Project Request button on the Facilities Planning & Construction (FP&C) website. Typically, Project Requestors are university faculty/staff with the Building Liaison role, however, this is not required.

Key Terms

Minor Projects	Projects with estimated construction costs less than $2 Million. Minor Projects span a wide variety of project types. Common types are listed below: • Installing a lock with electronic access on an office door. • Installing parking meters all over campus. • Renovating a classroom. • Replacing components of an HVAC system on a sizable building. Minor projects vary in cost and complexity, ranging from $10,000 carpet replacements, to $1.9M HVAC system upgrades for large campus buildings.
Feasibility Studies	FP&C can provide basic feasibility studies for a project to help determine the viability and rough cost, using existing building documentation, field investigations, and professional expertise. We can also contract third-party design professionals for more in-depth studies and analyses.
Space Planning and Analysis	FP&C can provide space planning studies for a project. We can also contract third-party design professionals for more in-depth studies and analyses. In some cases, where the adjustments do not affect life safety items (sprinklers, emergency egress, fire alarm changes, etc.), or exceed $50,000 of construction cost, these plans may be used for bid and construction.
Concept Design	FP&C can provide concept-design imagery to help envision the direction of the project, and to gather financial support for the project. We can also contract third-party design professionals for more in-depth or elaborate concept-design services.

Project Requestor	Individual who submits a Minor Project Request Form.
Project Request	The general action of requesting assistance from FP&C regarding one of the services FP&C provides.
Project Request Process	A specific process in eBuilder, in which project requests are evaluated and either rejected, or approved and assigned to a Project Manager.
Requesting Entity	College, Department, or other entity which requests a minor project.
Campus Client	Ongoing Point of Contact for the project, who the PM can contact with any question for the Requesting Entity.
Client Stakeholder	User able to provide an initial validation of the request, that it the Requesting Entity will support the project, and all information submitted in the Minor Project Request Form is correct.
Budgetary Authority	User who is able to approve the project funding is available.
Court	An eBuilder term referencing when an item is ready for action by the user. For example, when the Project Request Process form is “In my court” it would grant the user the ability to take action on the form.

Key Steps
Start: Project Requestor submits a Minor Project Request form through the FPC website
Step1: Project Coordinator Content Review
Step2: Client Stakeholder Validation
Step3: Space Administration Review/Approve
Step3A (Situational): Other Departmental Reviews
Step4: Project Coordinator Fiscal Review
Step5: FP&C Director Review/Approve
Project Coordinator Assigns AD/Initiates Turnover to FO/Client Pass off
Step6: FP&C Assistant Director Assigns Project Manager
Step7: Project Administrator Creates a Project Shell in eBuilder
Step8: Project Administrator Assigns project to PM
Finish: Project Manager Acknowledges Project

Submit a Minor Project Request Form
The Project Requestor completes the request form "01 - Project Request (PRP)" by first navigating to the Facilities Planning & Construction website http://fp.ucf.edu/minor-projects/ and selecting the "CLICK HERE TO SUBMIT A MINOR PROJECT REQUEST" button. The Project Requestor must complete all required fields before submitting the form, and may complete non-required fields if they have the information.

Project Coordinator Content Review
• An FP&C Project Coordinator reviews the Project Request Form to ensure accuracy and clarity of the submitted information. • If the Project Coordinator has any questions, they will reach out to the Project Requestor, Campus Client, Budgetary Authority, or Client Stakeholder for more information.

Client Stakeholder Validation
After the Project Coordinator Content Review is completed, the Project Request Form will be returned to the individual selected as the Client Stakeholder for validation (this is a field selected by the Project Coordinator and only appears once in eBuilder). Once the Client Stakeholder is satisfied that the project information is accurate, they submit the project for review by Space Administration.

Space Administration Review
Space Admin reviews the project to see if it has any impacts on requesting, planning, constructing, maintaining and, where necessary, upgrading the University's physical facilities, especially buildings. For Minor Projects, Space Admin reviews the request to determine if rooms will be created/removed, which impact room numbers, or if space use categorization will be changed.

Other Departmental Reviews
• Environmental Health & Safety (situational) – If a project is related to a research lab, or will store hazardous materials

Project Coordinator Fiscal Review
• Ensure funding availability for initial project review fee.

FP&C Director Review

The FP&C Director reviews projects based on the following criteria:
• Could the work requested be completed by Facilities Operations (FO)?
  ○ Project Routed to FO for review
• Is the Project Cost estimated by the Requestor a realistic value?
  ○ If low, approve, but add notes about project requiring a larger budget and/or have the PM provide them with an early cost estimate.

Project Coordinator Assigns AD
The Project Coordinator will review the FP&C Director's comments and assign the appropriate person for next steps. The comments will determine if the project (1) needs to be reviewed by FO for the purpose of assuming full control of the project, and creating a corresponding Work Order in the AiM system to track the work, (2) is approved to move forward under FP&C management, or (3) is approved to move forward under FO management, but using the eBuilder platform instead of AiM. • Project Request requires FO Review – Assign FO Administrator Director. • Project Request approved as eBuilder FP&C Project – Assign FP&C AD as appropriate. • Project Request approved as eBuilder FO Project – Assign FO Project Manager as appropriate.

Facilities Operations Review
FO Reviews the project request to see if it should be handled in house as an AiM Work Order, in which case the request is closed and an AiM Work Order is created. The client is notified of the change. FO may decide to keep the project if it requires only a single trade, which needs to be contracted out. The project would continue on through eBuilder, and would be assigned to an FO Project Manager.

Assignment of Project Manager

The Assistant Director (AD) is responsible for assigning a newly created eBuilder Project to a Project Manager (PM). A reporting tool has been developed to help guide the AD in this process. The Department Capacity Matrix provides the AD with information on each PM's current workload by assigning values or multipliers to criteria including:

- Project Value (Total Estimated Cost of Project)
- Delivery Method (Major or Minor)
- Design Required (Yes/No)
- Assigned Priority Level (1-5)
- Phase (New, Active, Awaiting Customer, Temp Hold, Close Out)

Using this as a guide the Assistant Director assigns the project to a PM, considering the PM's familiarity with similar projects and their general skills and abilities.

Project Administrator Creates a Project Shell in eBuilder

AiM Work Order

- When the Project Administrator (PA) receives the PRP form back into their court, they route the PRP form to Work Control in eBuilder.
- Work Control creates a Work Order in AiM.
- Work Control then routes the PRP form, containing the Work Order Number, back to the PA.
- To verify that the Work Order has been created, the PA logs into AiM and searches for the AiM Work Order Number.

eBuilder Project Shell

For detailed instructions please see the eBuilder Create Project Shell process.

The PA creates the Project Shell in eBuilder by selecting the Projects tab, then selecting the Add button. To prepare a project, the PA will:

- Input all required information
- Apply templates to the project
- Create the Cost Module
- Add Project Participants
- Attach relevant documentation including any comments from the PRP form

Project Administrator Assigns Project to PM

Once the above steps have been completed, the PA selects the PM and then selects the Create Project button, which will move the newly created project into the Project Manager's court.

Acknowledgement of Project
The PM will receive an email notification indicating they have a new process instance in their court (see below). To complete the Project Request Process, the PM logs into eBuilder and acknowledges the project they have been assigned.

From: UCF - e-Builder Network Notification [mailto:bounces@e-builder.net]
Sent: Wednesday, July 18, 2018 3:26 PM
To: Cheryl Colvin <Cheryl.Colvin@ucf.edu>
Subject: ACTION REQ'D - Project Requests Repository - Office upgrade | Requested by: Jorge Rivera Estimated Value: $0

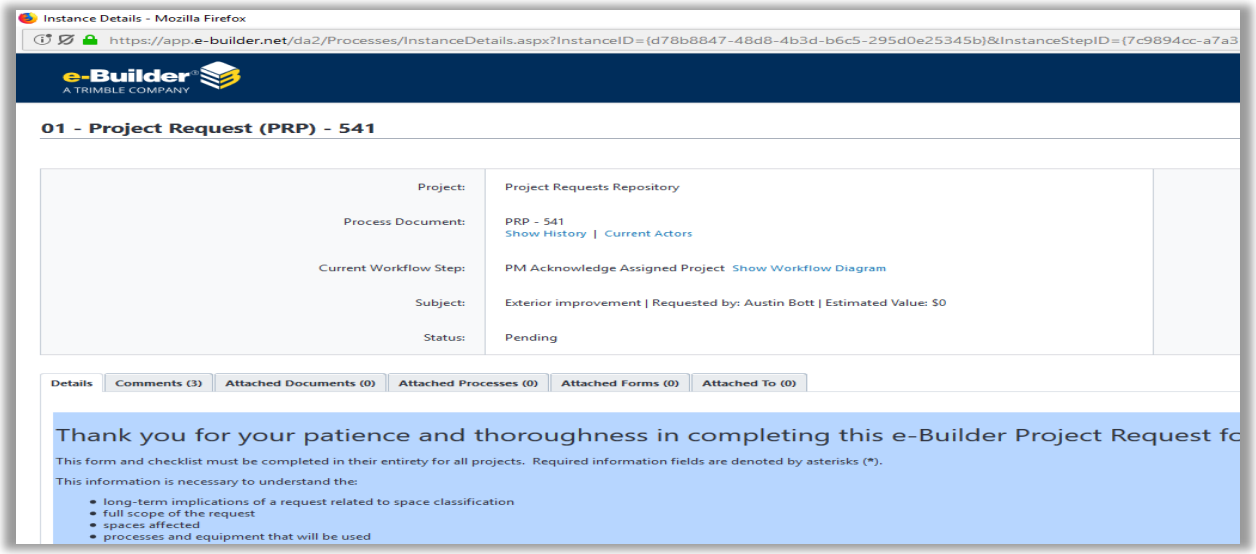
Project Requests Repository.

Process instance is in your court. To view details or take action, click here.

Process Details	
Project	Project Requests Repository
Process	PRP - 135
Subject	Office upgrade | Requested by: Jorge Rivera | Estimated Value: $0
Step	Project Admin Route
In Step Since	07.18.2018
Last Action	Submit
Last Action Taken By	e-Builder Implementation
Status	Submitted

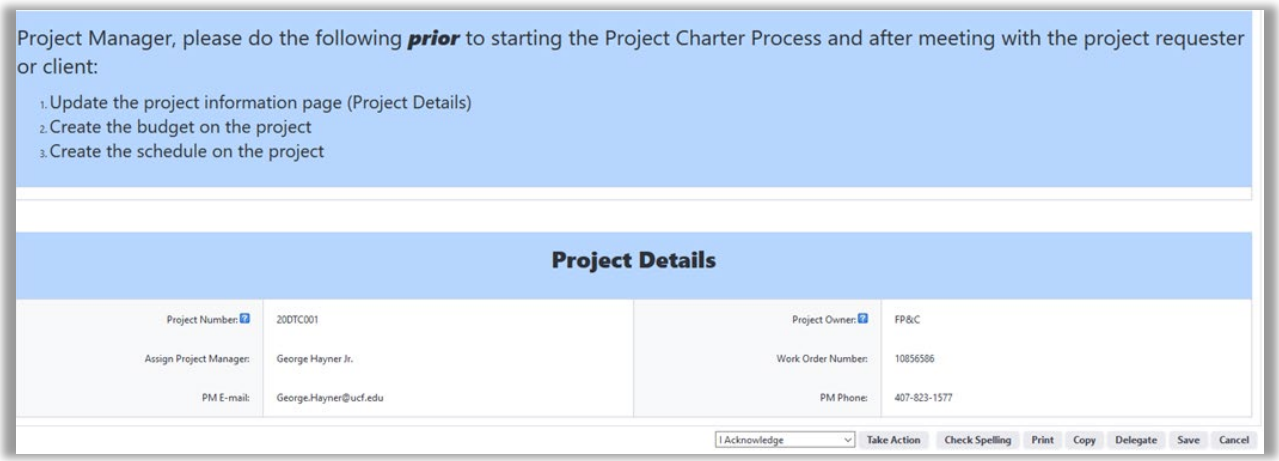
- Select the **click here** link to navigate to the Project Request Process
- Alternatively, log into e-Builder and the process will appear in your court
    - Select the displayed process

From the Project Request Process (PRP) screen



- Scroll to the bottom of the screen

From the bottom of the Project Request Process (PRP) screen

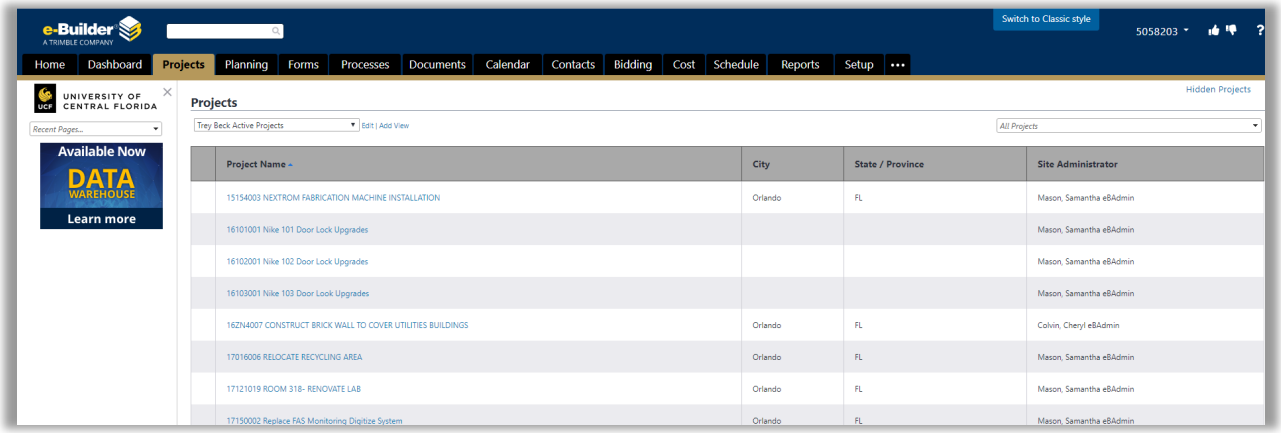


- Ensure the information in the Project Details section is correct
  - Project Number
  - Assign Project Manager
  - PM E-mail
  - Project Owner
  - Work Order Number
  - PM Phone
- Ensure the Take Action dropdown menu displays “I Acknowledge”
- Select the Take Action button

After the PM acknowledges the project, the Project Request Process closes. The project is generated and no further communication is sent to the PM.

The next step requires the PM to access the project. To access the project, the PM logs into e-Builder.

From the e-Builder home page



- Select the Projects Tab
- Select the project you acknowledged

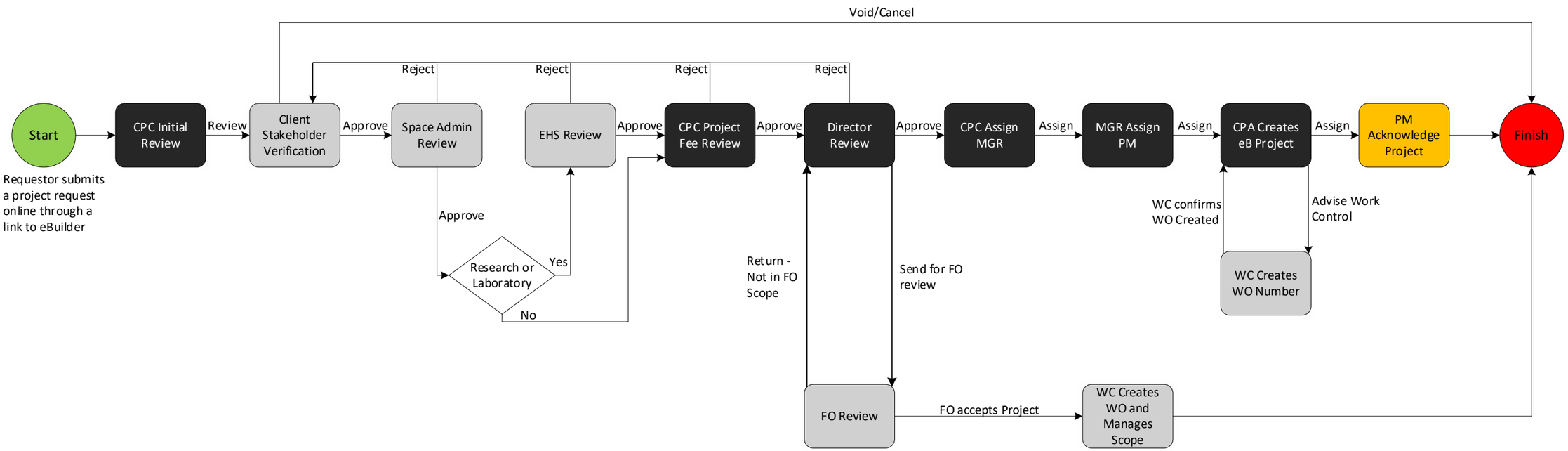
It is advisable to create a custom view to effectively filter the projects assigned to you. Open the below guide for detailed information.

\\FS.UCF\Facilities & Safety\FPC\E-BUILDER\Matt's Guides

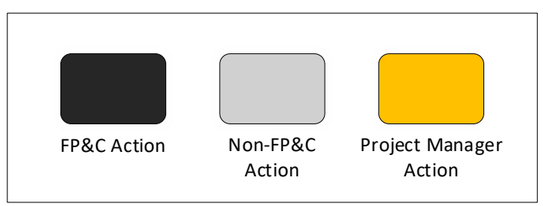
Creating and Managing Custom Views.pdf

Please see the Project Charter Narrative for more information on the next steps of the project management process.

01 – Project Request Process (PRP)



Director – Director, Facilities Planning
MGR – Manager, Facilities Planning
CPA – Construction Project Assistant
CPC – Construction Project Coordinator
eB – e-Builder Project Management Application
EHS – Environmental Health & Safety
FO – Facilities Operations
Space Admin – Space Administration
PM – Project Manager
WC – Work Control
WO – AiM Work Order



LEGEND