Minor Project Proposal Narrative

Purpose

The purpose of the Minor Project Proposal (MPP) is to provide the client with a project cost and schedule based on actual quotes for a well-defined project scope. Separate MPPs may be created for project design and project construction if a project requires both. By approving the Minor Project Proposal, the client indicates funding requested in the MPP is ready to be transferred to the FPC project account, and the client is prepared for the project to be executed as described in the MPP.

Initiator

The Project Manager is responsible for initiating the Minor Project Proposal process and working with the client to ensure the project and funding are approved.

Key Terms

Minor Project Proposal	An e-Builder process, which will include a Cost Breakdown and Scope of Work, and may also include a proposal from the vendor performing the work.
Facilities and Safety Business Office (FSBO)	Financial office within Facilities & Safety, which helps the PMs ensure all relevant financial regulations, policies, and rules are being followed on their projects. This office liaises with other financial units within the University to create Purchase Orders for construction projects, and ensure ownership of assets acquired during a project are transferred to the correct department.
PeopleSoft Financials Enterprise Resource Planning System (PeopleSoft)	The System of Record for the University of Central Florida. All financial transactions and inventory are recorded in this system.
Project Account	FP&C account from which project commitments can be drawn.
Funding Account(s)	Accounts from which funds for the project are transferred. These accounts will vary by funding source.

Key Steps
Start: PM gathers and prepares documents containing MPP information, initiates the 05-Minor Project Proposal Process in e-Builder, completes all required fields, attachments necessary documents, and Submits the process to the Client. Step1: Client reviews MPP information and can: Step1A: Ask the PM for additional information Step1B: Agree to fund the project immediately Step1C: Indicate funding will be ready at a later date Step1D: Advise that the project will not be funded Step2: PM takes the appropriate action by: Step2A: Providing any requested information back to the client Step2B: Request FSBO transfer funds from the designated Funding Account(s) to the Project Account Step2C: Advise client of options regarding the funding delay Step2D: Void the MPP process and close the project Step3: FSBO reviews Funding Account(s) to ensure availability of funds Step4: FSBO transfers funds from Funding Account(s) to FPC Project Account Step4A: If funds are not available, FSBO routes process to PM with comments Finish: PM is notified of funds transfer and completes process FinishA: If funds are not available, PM contacts client to discuss

Step Detail – PM Actions

Start: PM gathers and prepares documents containing MPP information, initiates the 05-Minor Project Proposal Process in e-Builder, completes all required fields, attachments necessary documents, and Submits the process to the Client.

How to guide – The Minor Project Proposal (MPP) Process

The e-Builder Minor Project Proposal is comprised of the following elements:

Subject	"MP" + Project Name + "Minor Project Proposal"
Notes/Comments	Project information relevant to Client decision making
Estimated Project Duration	Value derived from Project Schedule
Total Proposed Cost	Value derived from actual quotes and approved budget
Cost Breakdown	PM uploads MPP Cost Breakdown report here
Scope of Work	PM uploads completed Minor Project Scope of Service document here
Contractor Proposal	PM uploads contractor proposal document here
Additional Information	PM upoads other supporting documentation here

Gather and prepare documents containing MPP information

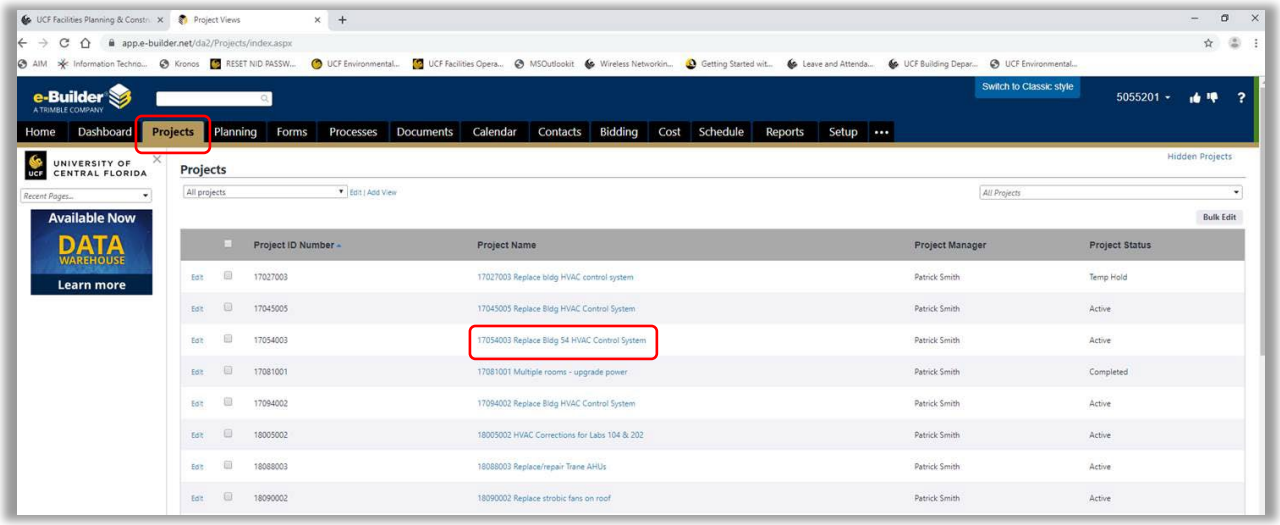
MPP Cost Breakdown	Required
Scope of Work (Design)	Required for Design MPP
Scope of Work (Construction)	Required for Construction MPP
Contractor Proposal (example)	Not Required – Encouraged
Additional Information (example)	Not Required - Discretionary

Initiate the 05-Minor Project Proposal Process in e-Builder

Log into e-Builder

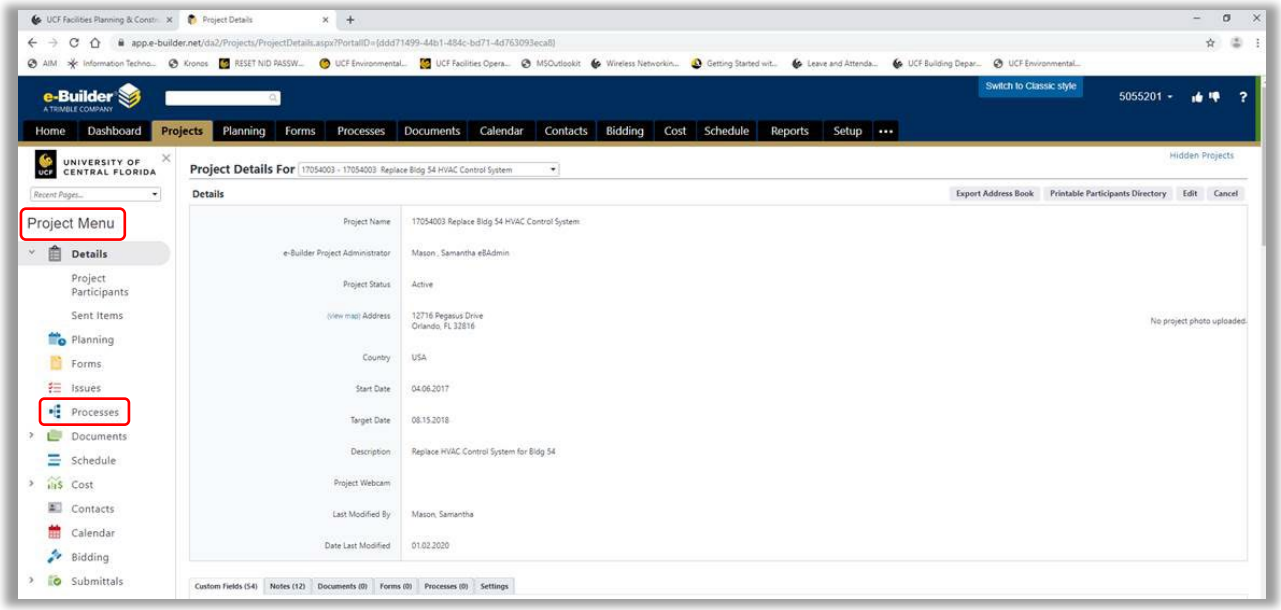
- Access the system at https://fp.ucf.edu/ by selecting the e-Builder button
- Set up a direct shortcut using the following url: https://federation.net.ucf.edu/adfs/ls/idpinitiatedsignon.aspx?RelayState=RPID=sso.e-builder.net

From the e-Builder Projects screen:



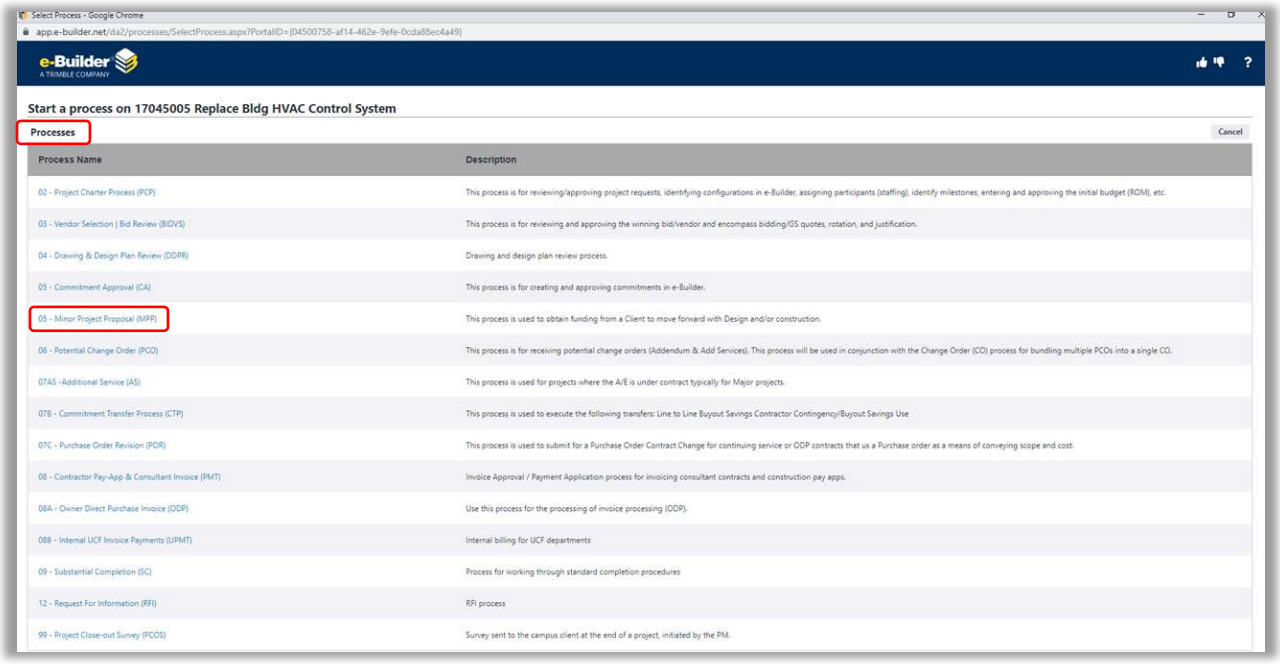
- Select the Project Name for which you wish to initiate a Minor Project Proposal

From the e-Builder Project Menu:



- Select the Processes link

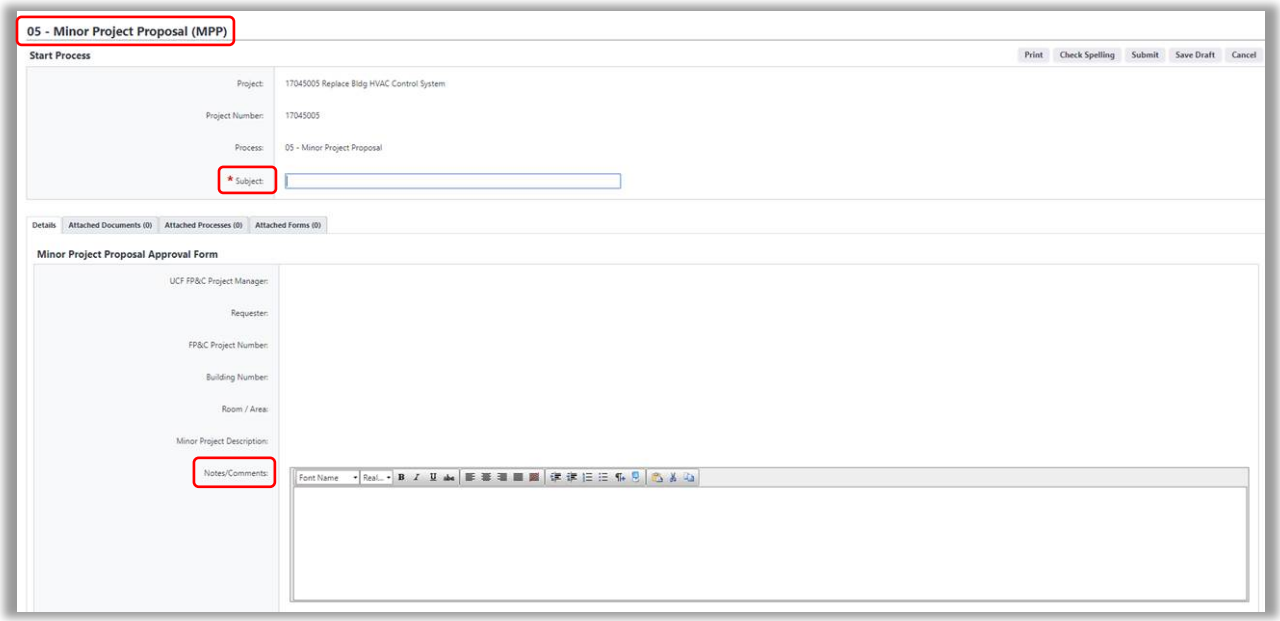
From the e-Builder Processes screen:



- Select the 05 – Minor Project Proposal (MPP) link

Complete all applicable fields, attachment necessary documentation, and Submit the process to the Client.

From the 05 – Minor Project proposal (MPP) screen:



- In the Subject field:
  - Input "MP" + Project Name + "Minor Project Proposal"
    - *MP 17045005 Replace Bldg HVAC Control System Minor Project Proposal*

- In the Notes/Comments text box:
  - Input any information you find relevant to the decision-making process of the client, which would impact their decision to execute or abandon the project.
    - *I've added 45% contingency to cover estimated $10,000.00 furniture costs.*

- In the Estimated Project Duration field:
  - Input a time period, including a reasonable buffer, in which you expect the project scope included in this MPP to be accomplished.

- In the Total Proposed Cost field:
  - Input the total dollar amount from the MPP Cost Breakdown.

- For the Cost Breakdown attachment field:
  - Select the Browse Computer button
  - Navigate to the location where the MPP Cost Breakdown document is saved, select the file, and complete the attachment process.

- For the Scope of Work attachment field:
  - Select the Browse Computer button
  - Navigate to the location where the Minor Project Design/Construction Scope of Services document is saved, select the file, and complete the attachment process.

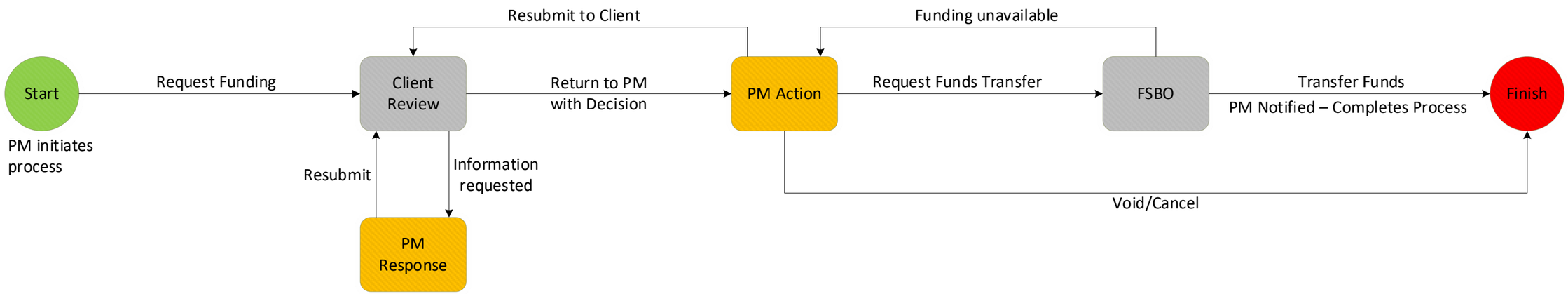
- For the Contractor Proposal attachment field:
  - Select the Browse Computer button
  - Navigate to the location where the vendor proposal document relevant to this MPP is saved, select the file, and complete the attachment process.

- For the Additional Information attachment field:
  - Select the Browse Computer button
  - Navigate to the location where any document, with supplemental information relevant to this MPP is saved, select the file, and complete the attachment process.

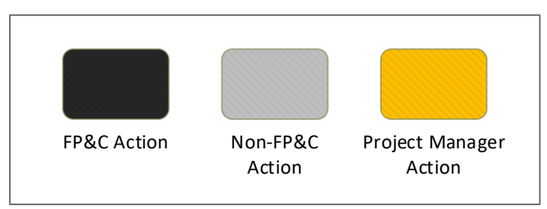
- When exiting the process:

- Select the Save Draft button to save your changes and keep the process in your court.
- Select the Check Spelling button to have the system perform a check of all verbiage input into the free form text fields. This is recommended to catch any accidental misspellings, which allows the PM to present a more professional image to the recipient.
- Select the Submit button to send the process to the Client for review.

05 – Minor Project Proposal Process (MPP)



Client – Entity requesting project
PM – Project Manager
FSBO – Facilities & Safety Business Office



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