Project Charter - Schedule

Purpose

A schedule is created by the PM during the Project Charter process, which provides a timeline of high-level project deliverables during each of the Project Process Phases. The schedule developed at this stage is not intended to be as detailed or precise as the construction schedule maintained by the contractor. Its purpose is to provide FP&C leadership, and the client, with an approximate timeline on which to make further decisions. For FP&C leadership, they will review the schedule to ensure the time allocated to the project deliverables appears to be in line with their experience. For the client, the schedule allows them to determine how to incorporate the project into their operations activities.

Initiator

The Project Charter - Schedule is developed by the Project Manager (PM). The schedule differs from the budget as it is <u>not</u> required to be approved by an FP&C Manager, Facilities Planning (MGR) before it can be included in the Project Charter process. The MGR will review the schedule as part of their overall Project Charter review. Before developing the Project Charter – Schedule, the PM should meet with the client and all relevant partner departments to develop the basic Project Scope. The PM develops the schedule based on this scope.

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	PCP	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 MGR and/or Director to review and approve.
Owners Project Requirements	OPR	A written document that details the functional requirements of a project and the expectations of how it will be used and operated.
Commissioning	Cx	The process of assuring that all systems and components of a major piece of equipment, a process, a building or similar are designed, installed and tested in accordance with the operational requirements of the owner.
Minor Project Proposal	MPP	Proposal generated by the PM, which includes actual costs corresponding to the project's Statement of Work, project funding sources, and a proposed schedule. Acceptance of a Minor Project Proposal by the Client results in project funds being transferred into the FPC Project Account.
Purchase Order	PO	A Purchase Order (PO) is a binding contract between UCF and the Vendor. POs include the services/materials being purchased, the scope of service, payment terms, invoicing instructions and the purchase order number.

Architect/Engineer	A/E	Broad term for professionals responsible for the design of buildings, building components, and systems
Schematic Design	SD	Schematic Design produces rough drawings of a site plan, floor plans, elevations and often illustrative sketches or computer renderings.
Design Development	DD	Design development depicts a more detailed site plan as well as floor plans, elevations and section drawings with full dimensions.
Construction Documents	CD	Construction documents include a complete set of architectural drawings (site plan, floor plans, sections, details, etc.) that are combined with structural drawings (and possibly mechanical and electrical drawings) that have enough detail for the contractor to build your project.
General Contractor	GC	A general contractor is the contractor with main responsibility for the construction, improvement, or renovation project under contract, and is the party signing the prime construction contract for the project.
Trade Contractor	TC	A trade contractor is essentially a subcontractor who specializes in a specific part of a construction project. These parts can include electrical, plumbing, landscaping, and other activities.
Manager, Facilities Planning	MGR	Member of Facilities Planning & Construction leadership team, responsible for supervision of a subset of Project Managers and/or support personnel
Associate Vice President	AVP	Leader of the Facilities & Safety Division, reporting to the UCF Vice President of Administration & Finance
Building Code Office	BCO	Now the Building Department. Responsible for coordination of all building inspections, permit issuance, and certifications of Completion or Occupancy for UCF construction projects
State Fire Marshal	SFM	State agency responsible for plan review and inspection of all life safety systems installed or modified during construction activities
UCF Certificate of Completion	CC	A certificate of completion is a document issued by the UCF Building Department certifying that all inspections have been passed
Certificate of Occupancy	CO	A certificate of occupancy is a document issued by the UCF Building Department certifying a building's compliance with applicable building codes and other laws, and indicating it to be in a condition suitable for occupancy

Key Steps

Start: Review Basic Project Scope

Step1: Access e-Builder Schedule Module

Step2: Delete Schedule tasks and sub-tasks which don't apply to the project

Step3: Review and update duration of remaining sub-tasks

Step4: Save a snapshot of the schedule

Step5: Save the schedule

Finish: Schedule ready for inclusion in Project Charter Process

Review Basic Project Scope

Before creating a schedule, the PM should always review the basic Project Scope they created after meeting with the client and any partner departments involved with this project.

Access e-Builder Schedule Module

To create a schedule for a project, the PM logs into e-Builder, selects the project they wish to create a schedule for, and selects the Schedule module from the Project Menu. A full schedule is available for the PM as it was added by their project assistant when the project shell was created.

Delete Schedule tasks and sub-tasks which don't apply to the project

The PM reviews the schedule and is able to delete tasks and sub-tasks which don't apply to their project.

Review and update the duration of remaining sub-tasks

The PM reviews each schedule sub-task and updates its duration as appropriate in order to reflect the project-specific duration for the sub-task relative to the specific project timeline.

Save a snapshot of the Schedule

The PM takes a snapshot of the project schedule to record a baseline.

Save the Schedule

The PM saves the schedule to memorialize all updates.

Schedule ready for inclusion in the Project Charter Process

The schedule is now ready to be included in the Project Charter Process (PCP). The PM can initiate the PCP and execute the Project Schedule section, which will pull from the now saved project schedule information.

How to guide – The Project Charter - Schedule

Before creating the Project Schedule, the PM should complete the below activities:

1. Review Notes and Documents included the Project Details
2. Meet with the client and any relevant partner departments to develop a basic project scope
3. Review similar projects in e-Builder if desired
4. Gain input from the project A/E if applicable

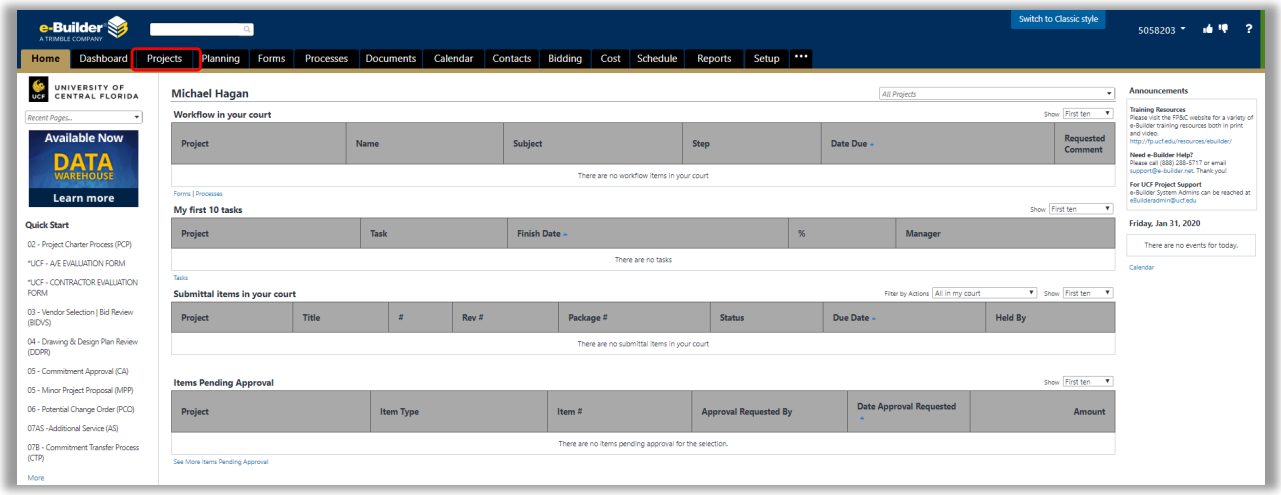
Project Schedule Elements

There are 5 possible schedule elements which could be applicable for a project. The elements included in the project-specific schedule will be based on the scope of each project.

Schedule Element	Related Process(es)
PLANNING	• Project Charter Process
DESIGN	• Minor Project Proposal – Design • Commitment Approval(s) – Design Professionals • Drawing & Design Plan Review – Schematic Design Documents • Purchase Order Revision – Design Professionals • Drawing & Design Plan Review – Design Development Documents • Drawing & Design Plan Review – Construction Documents
BID/PERMIT	• Vendor Selection | Bid Review • Justification • Rotation • Hard Bid • Minor Project Proposal – Construction • Commitment Approval(s) – Construction • Email permit communication and see Citizenserve TBD process
CONSTRUCTION	• Potential Change Order • Change Order • Purchase Order Revision - Contractor • Commitment Transfer Process • Contractor Pay-App & Consultant Invoice • Owner Direct Purchase Invoice • Internal Invoice Payments • Request For Information • FPC – FO Support Request Form • Substantial Completion
CLOSEOUT	• Final Completion and Close Out

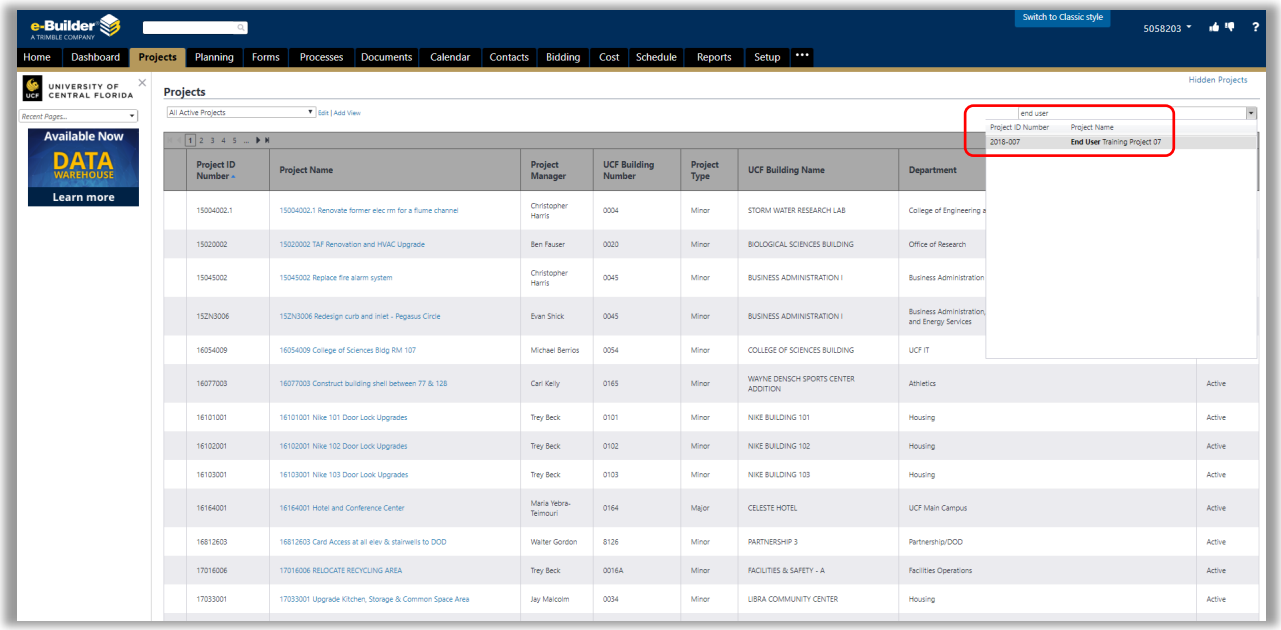
Navigate to the Schedule

From the e-Builder Home screen



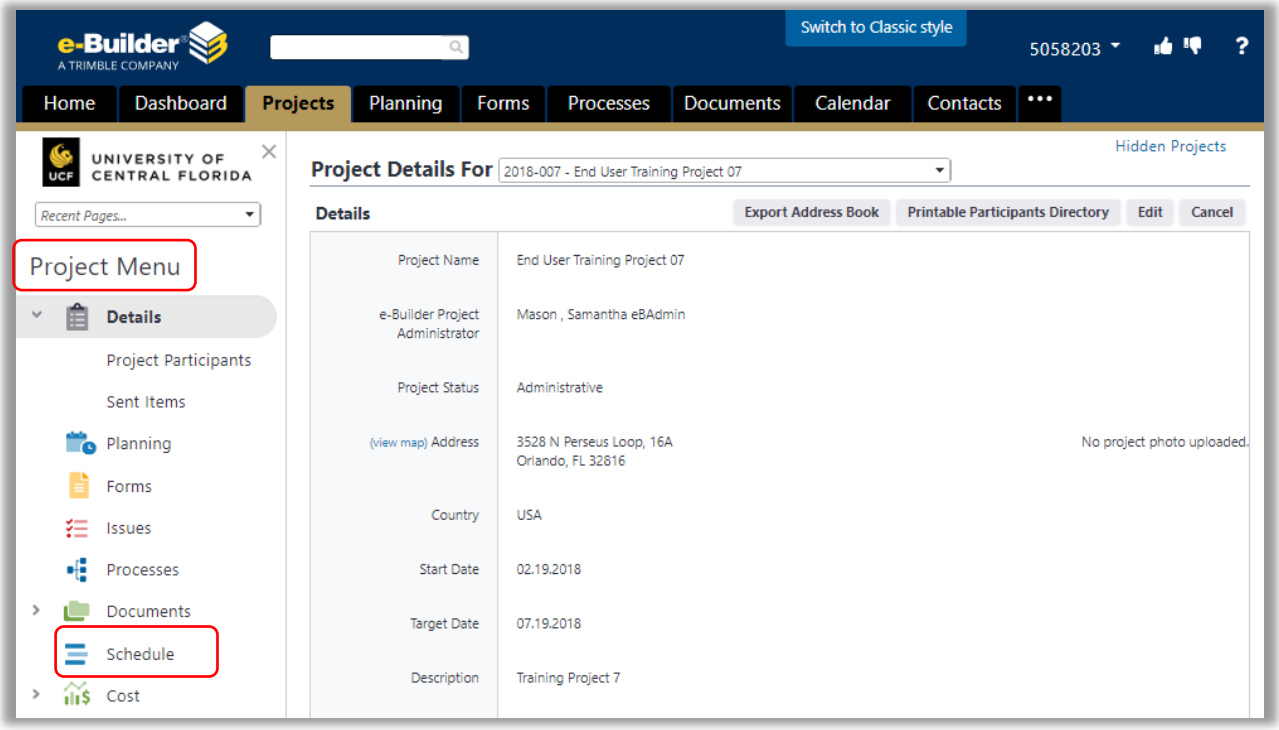
- Select the **Projects** menu button

From the Projects Screen



- Search for and select the project for which you wish to create a schedule

From the Projects screen – Project Menu



- Select the **Schedule** link

Create the Schedule

Before a project is assigned to a project manager, their project assistant applies a schedule template, which creates a schedule with all five (5) schedule tasks and their sub-tasks.

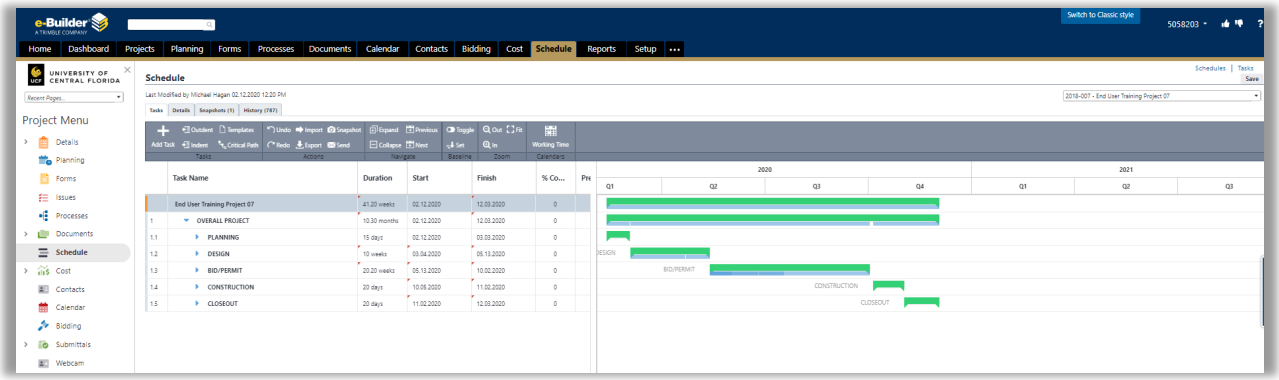


Table 1- Simplified Schedule Tasks and Sub-Tasks

Schedule Task	Sub-Tasks
PLANNING	• Project Charter Development

DESIGN	• DESIGN COMMITMENT APPROVAL
	  ○ A/E Proposal Development
	  ○ Requester MPP Approval
	  ○ A/E Commitment Process
	• CONSTRUCTION DOCUMENTS PHASE
	  ○ Drawing Development
	  ○ Issue CDs

BID/PERMIT	• ***Justification***
	  ○ Scope Issued to GC
	  ○ GC Scope Walk
	  ○ GC Proposal Development
	• ***Rotation***
	  ○ Scope Issued to GC
	  ○ GC Scope Walk
	  ○ GC Proposal Development
	• ***Hard Bid***
	  ○ Bid Advertisement
	  ○ Bidding
	  ○ Bid Open/Review
	• CONSTRUCTION PROCUREMENT
	  ○ Bid/Quote Received
	  ○ Requester MPP Approval
	  ○ GC Requisition/PO Process
	• PERMITTING
	• ***GC/TC Drawing Submit***
	  ○ Permit Doc Development
	  ○ Doc Submitted to BCO
	  ○ BCO Review
	• ***A/E Drawing Submit***
	  ○ Doc Submitted to BCO
	  ○ BCO Review

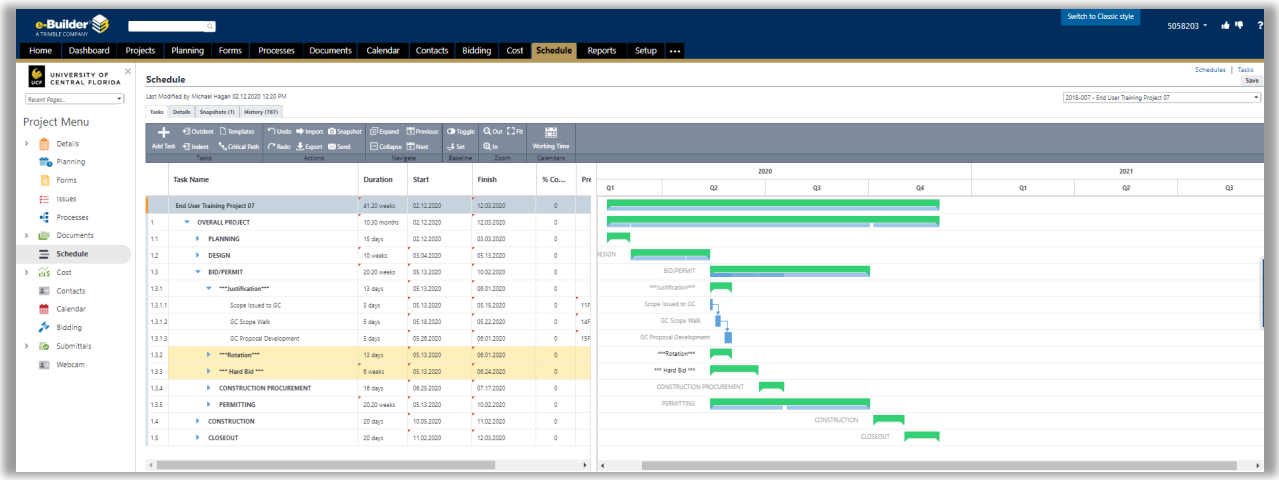
CONSTRUCTION	• Permit Received • Mobilization • Construction Activities • CC/CO Issued
CLOSEOUT	• Documents • Final Payment • Final Signoff

Deleting Schedule Elements

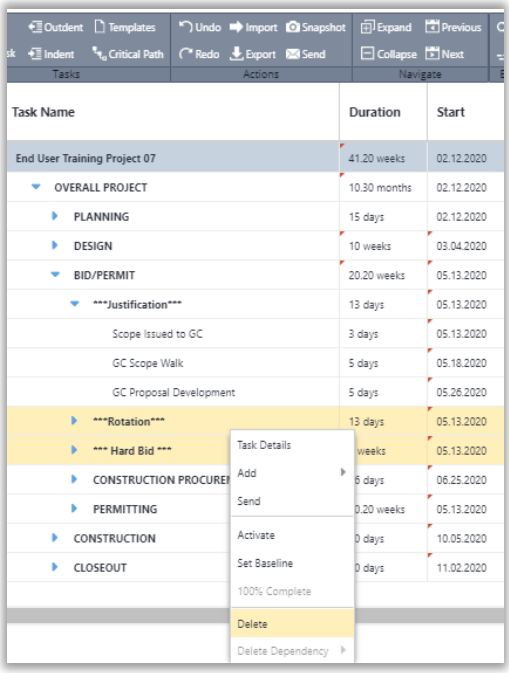
Not all schedule sub-tasks will apply to every project. Once the PM understands the project goals and develops a basic scope, they can delete unneeded sub-tasks from the schedule.

For example, if the contractor for the project will be selected via Justification, the PM can delete the ***Rotation*** and ***Hard Bid*** sub-tasks.

From the Schedule screen

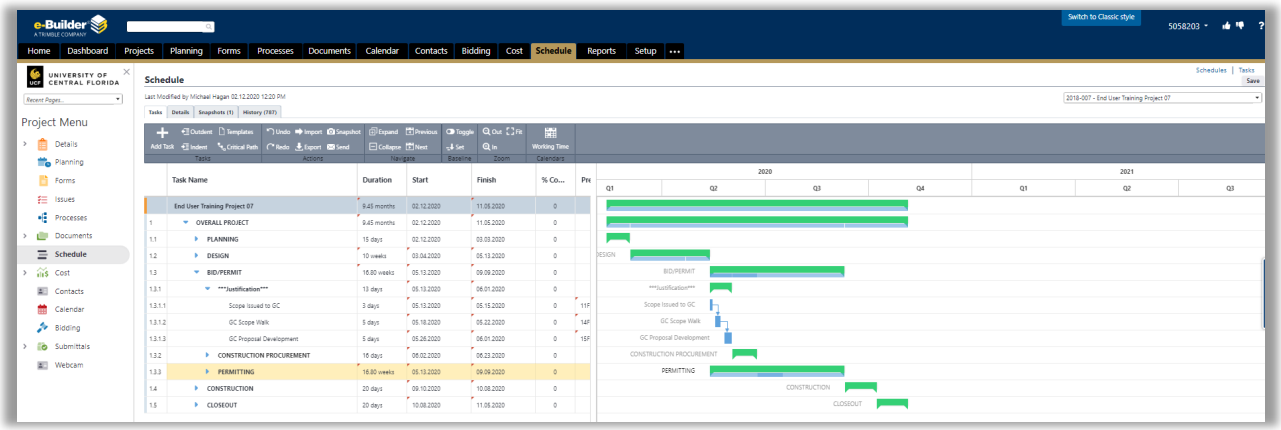


- Expand the BID/PERMIT task
- Select the desired sub-tasks
  - ***Rotation***
  - ***Hard Bid***
- Right-click within the selected sub-elements



- Select the Delete option

The sub-tasks are removed

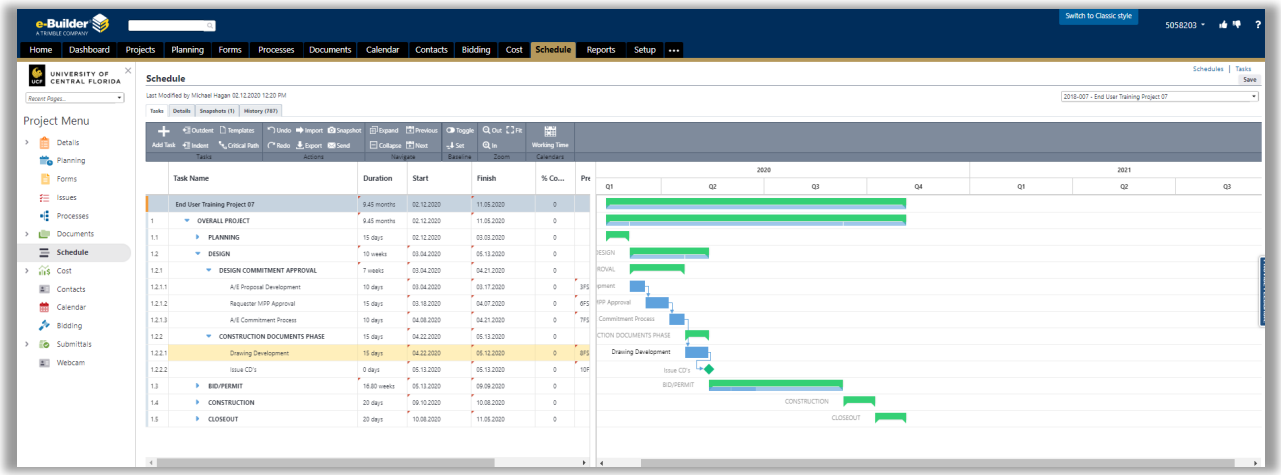


Updating schedule elements and sub-elements

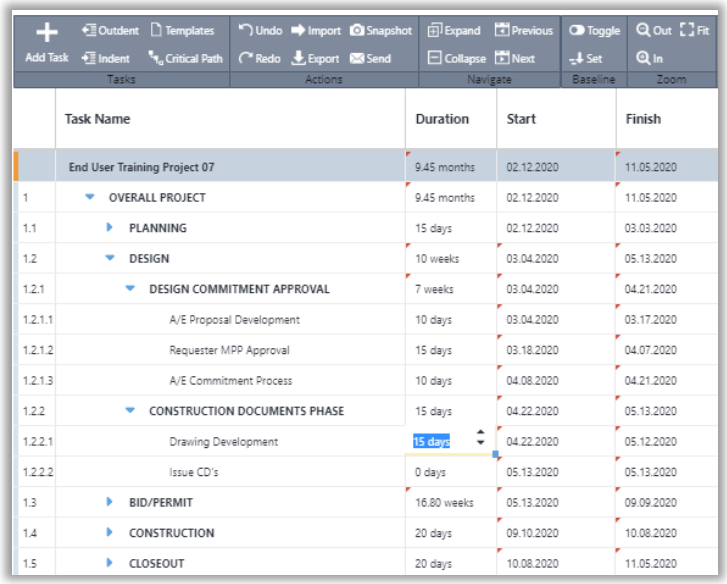
When the project manager is satisfied that the remaining schedule elements are valid for the project, they review the associated sub-elements, and modify them as needed. The applied schedule template includes values in the Duration, which are placeholders. The PM must review each duration and input a value they believe accurately represents a realistic time frame for completion of the task.

Changing the duration of a sub-element

From the Schedule module

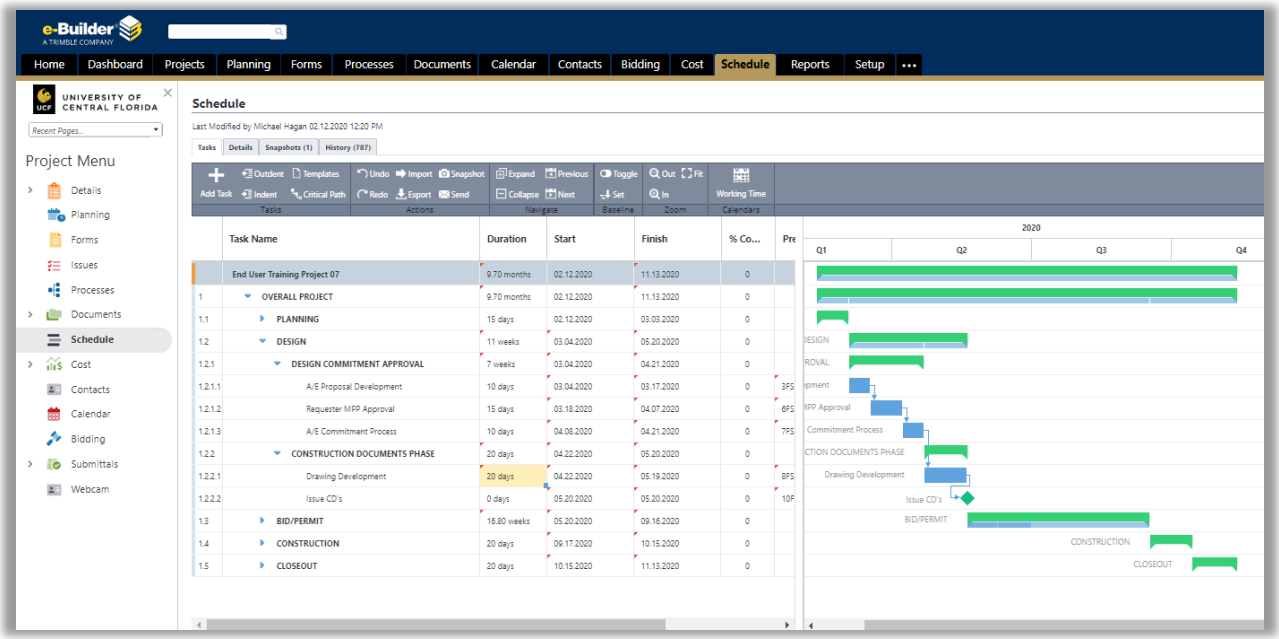


- Open the task you wish to review
  - *In this example, Drawing Development is selected*
- The duration for Drawing Development is preset to 15 days



	Task Name	Duration	Start	Finish
	End User Training Project 07	9.45 months	02.12.2020	11.05.2020
1	OVERALL PROJECT	9.45 months	02.12.2020	11.05.2020
1.1	PLANNING	15 days	02.12.2020	03.03.2020
1.2	DESIGN	10 weeks	03.04.2020	05.13.2020
1.2.1	DESIGN COMMITMENT APPROVAL	7 weeks	03.04.2020	04.21.2020
1.2.1.1	A/E Proposal Development	10 days	03.04.2020	03.17.2020
1.2.1.2	Requester MPP Approval	15 days	03.18.2020	04.07.2020
1.2.1.3	A/E Commitment Process	10 days	04.08.2020	04.21.2020
1.2.2	CONSTRUCTION DOCUMENTS PHASE	15 days	04.22.2020	05.13.2020
1.2.2.1	Drawing Development	15 days	04.22.2020	05.12.2020
1.2.2.2	Issue CD's	0 days	05.13.2020	05.13.2020
1.3	BID/PERMIT	16.80 weeks	05.13.2020	09.09.2020
1.4	CONSTRUCTION	20 days	09.10.2020	10.08.2020
1.5	CLOSEOUT	20 days	10.08.2020	11.05.2020

- Select the 15 days Duration field
- Input a value or use the **^** or **v** arrows to change the value to the desired number of days
    - *In this example, 20 days were used*



	Task Name	Duration	Start	Finish	% Co...	Pre
	End User Training Project 07	9.70 months	02.12.2020	11.13.2020	0	
1	OVERALL PROJECT	9.70 months	02.12.2020	11.13.2020	0	
1.1	PLANNING	15 days	02.12.2020	03.03.2020	0	
1.2	DESIGN	11 weeks	03.04.2020	05.20.2020	0	
1.2.1	DESIGN COMMITMENT APPROVAL	7 weeks	03.04.2020	04.21.2020	0	
1.2.1.1	A/E Proposal Development	10 days	03.04.2020	03.17.2020	0	3FS
1.2.1.2	Requester MPP Approval	15 days	03.18.2020	04.07.2020	0	6FS
1.2.1.3	A/E Commitment Process	10 days	04.08.2020	04.21.2020	0	7FS
1.2.2	CONSTRUCTION DOCUMENTS PHASE	20 days	04.22.2020	05.20.2020	0	
1.2.2.1	Drawing Development	20 days	04.22.2020	05.19.2020	0	8FS
1.2.2.2	Issue CD's	0 days	05.20.2020	05.20.2020	0	10F
1.3	BID/PERMIT	16.80 weeks	05.20.2020	09.16.2020	0	
1.4	CONSTRUCTION	20 days	09.17.2020	10.15.2020	0	
1.5	CLOSEOUT	20 days	10.15.2020	11.13.2020	0	

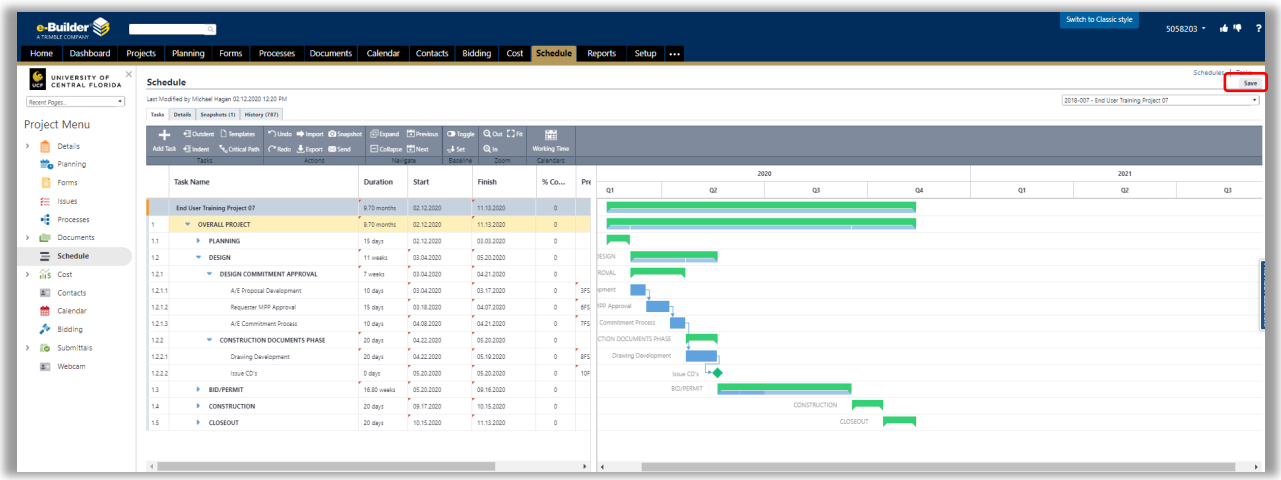
- Changing the duration of the Drawing Development task impacts any schedule tasks with Drawing Development set as a *predecessor.* This then has a waterfall effect on subsequently linked tasks.
    - The Finish date of the Drawing Development task changed from 05.12.2020 to 05.19.2020
    - The Start date of the Issue CD's task changed from 05.13.2020 to 05.20.2020
    - The Finish date of the Issue CD's task changed from 05.13.2020 to 05.20.2020

- The schedule template applies the predecessor relationships systematically. If a project manager adds a new sub-task, they must manually apply a predecessor relationship if applicable.

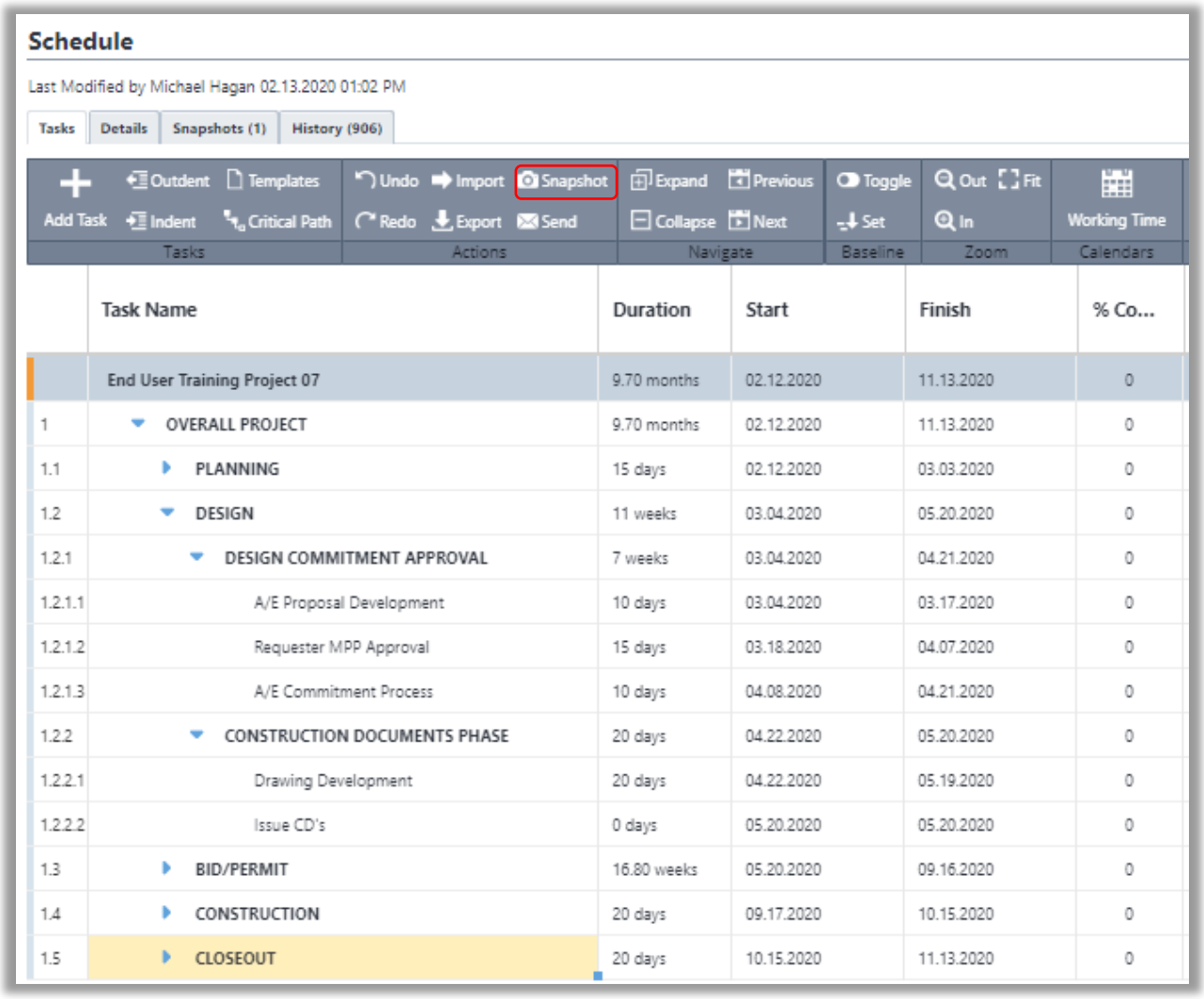
Saving updates and capturing the baseline

Once all updates have been made to the schedule the project manager saves the schedule and takes a snapshot to record the schedule as it appears at this point. The PM will be updating the schedule at regular intervals throughout the project life cycle and the snapshots will record specific past schedules, which can be compared to the current schedule.

From the Schedule module

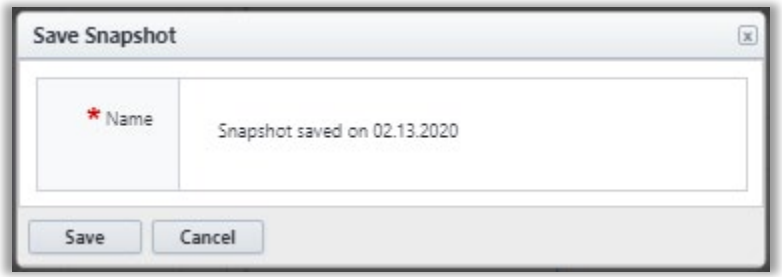


- Select the **Save** button

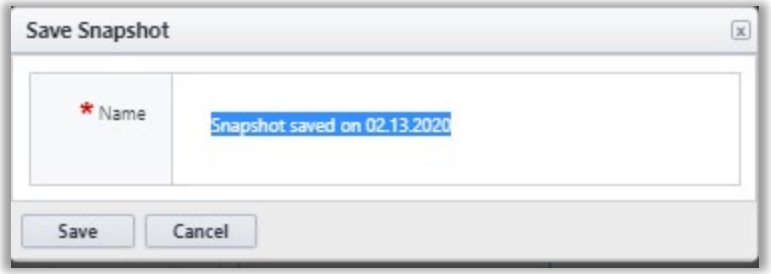


	Task Name	Duration	Start	Finish	% Co...
	End User Training Project 07	9.70 months	02.12.2020	11.13.2020	0
1	OVERALL PROJECT	9.70 months	02.12.2020	11.13.2020	0
1.1	PLANNING	15 days	02.12.2020	03.03.2020	0
1.2	DESIGN	11 weeks	03.04.2020	05.20.2020	0
1.2.1	DESIGN COMMITMENT APPROVAL	7 weeks	03.04.2020	04.21.2020	0
1.2.1.1	A/E Proposal Development	10 days	03.04.2020	03.17.2020	0
1.2.1.2	Requester MPP Approval	15 days	03.18.2020	04.07.2020	0
1.2.1.3	A/E Commitment Process	10 days	04.08.2020	04.21.2020	0
1.2.2	CONSTRUCTION DOCUMENTS PHASE	20 days	04.22.2020	05.20.2020	0
1.2.2.1	Drawing Development	20 days	04.22.2020	05.19.2020	0
1.2.2.2	Issue CD's	0 days	05.20.2020	05.20.2020	0
1.3	BID/PERMIT	16.80 weeks	05.20.2020	09.16.2020	0
1.4	CONSTRUCTION	20 days	09.17.2020	10.15.2020	0
1.5	CLOSEOUT	20 days	10.15.2020	11.13.2020	0

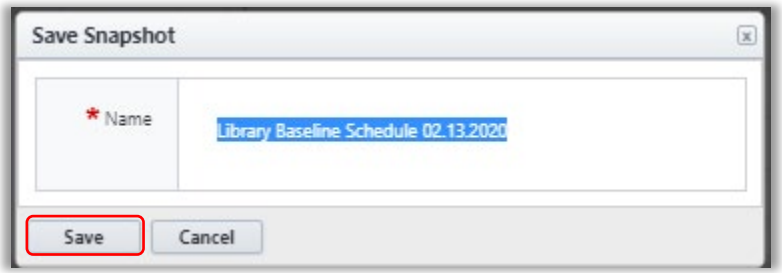
- Select the **Snapshot** menu item



- Snapshot saved on *current date* auto-populates



- Select the text in the name field
- Input a new name



- Select the **Save** button

You will be returned to the main schedule screen.

The schedule is now ready to be included in the Project Charter.