

Best Practices and Strategies for Project Management

Agenda

- Introductions
- Methods for Planning, Executing, and Delivering Successful Capital Improvement and Facility Projects
- Managing Scope, Budget, Schedule, Communication, and Stakeholder Expectations
- Identifying Warning Signs and Recovering Projects That Do Not Go as Planned

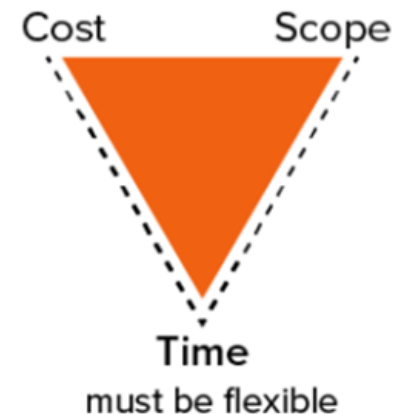
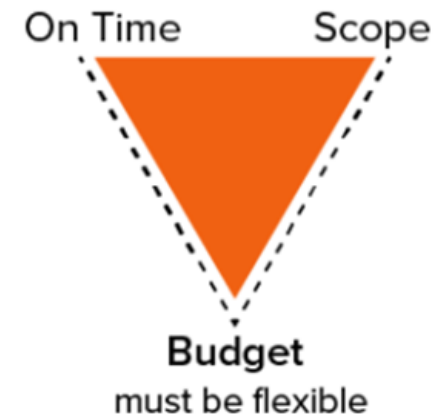
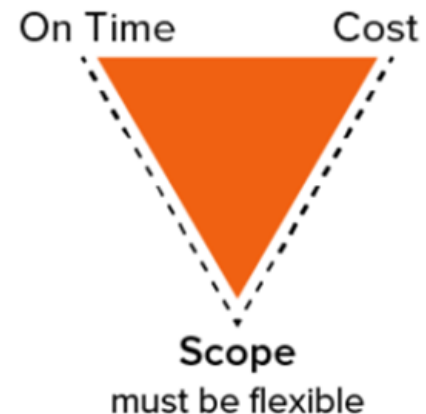
Why Project Management Matters in K-12 Facility Projects

- Direct impact on student learning environments
- Stewardship of taxpayer and bond program funds
- Minimizing operational disruptions to campuses during construction

Defining Project Success

- Delivered on budget
- Delivered on schedule
- Meets educational and operational goals

PROJECT MANAGEMENT TRIPLE CONSTRAINT: BALANCING SCOPE, TIME, AND BUDGET



Project Life Cycle Overview

- Planning and programming
- Design and procurement
- Construction and closeout



Lessons from Successful School Projects

- Early stakeholder engagement
- Develop realistic cost estimates
 - Estimates good for one year, revise if needed
- Clear project objectives, avoid scope creep
- Timely decision-making
 - Implement mechanism for responses and approvals



Managing Construction Scope, Budget, Schedule, Communication, and Stakeholder Expectations



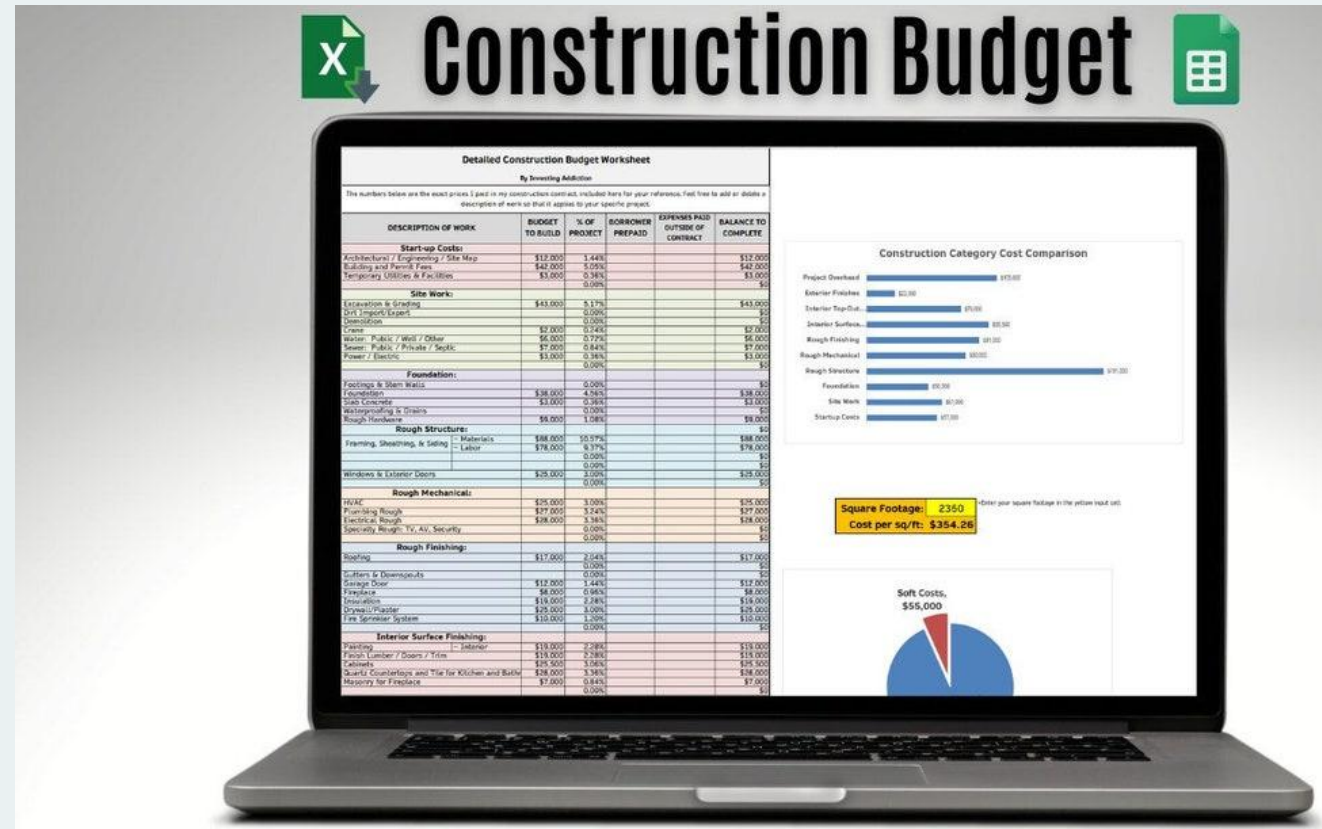
Managing Construction Project Scope

- Establish clear project goals at pre-construction meeting
- Document requirements early
 - Establish meeting frequency (usually in contract)
 - Emphasize critical dates
- Control scope creep during construction
- Read your construction contract!



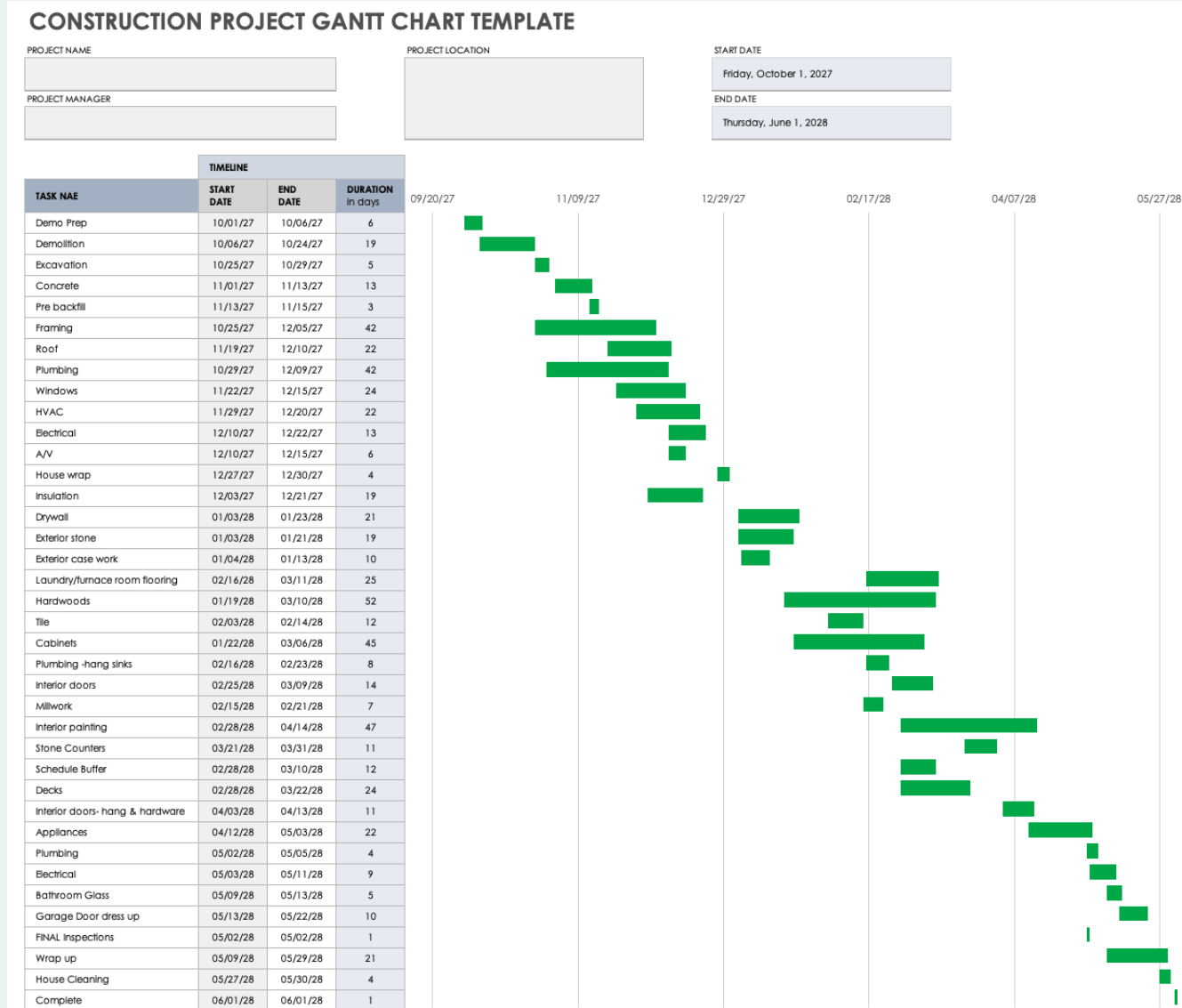
Budget Management Best Practices

- Review Schedule of Values
- Maintain contingency funds
 - Ranges from 5% to 10%
- Track changes continuously
 - RFI, ASI, CAEC, Change Orders



Schedule Management

- Identify critical milestones
 - Highlight at all meetings
- Monitor critical path activities
- Address delays immediately and adjust schedule if needed.



Communication and Stakeholder Management

- Regular status updates
 - Maintain minutes of meeting
- Transparent issue reporting
- Defined communication channels
 - How is information funneled
 - What does your construction contract require?



Identifying Warning Signs and Recovering Projects That Do Not Go as Planned



Early Warning Signs of Project Trouble

- Repeated schedule slippage
- Increasing change orders or RFIs
- Communication breakdowns
 - Turnover with contractor staff
 - Lack of response



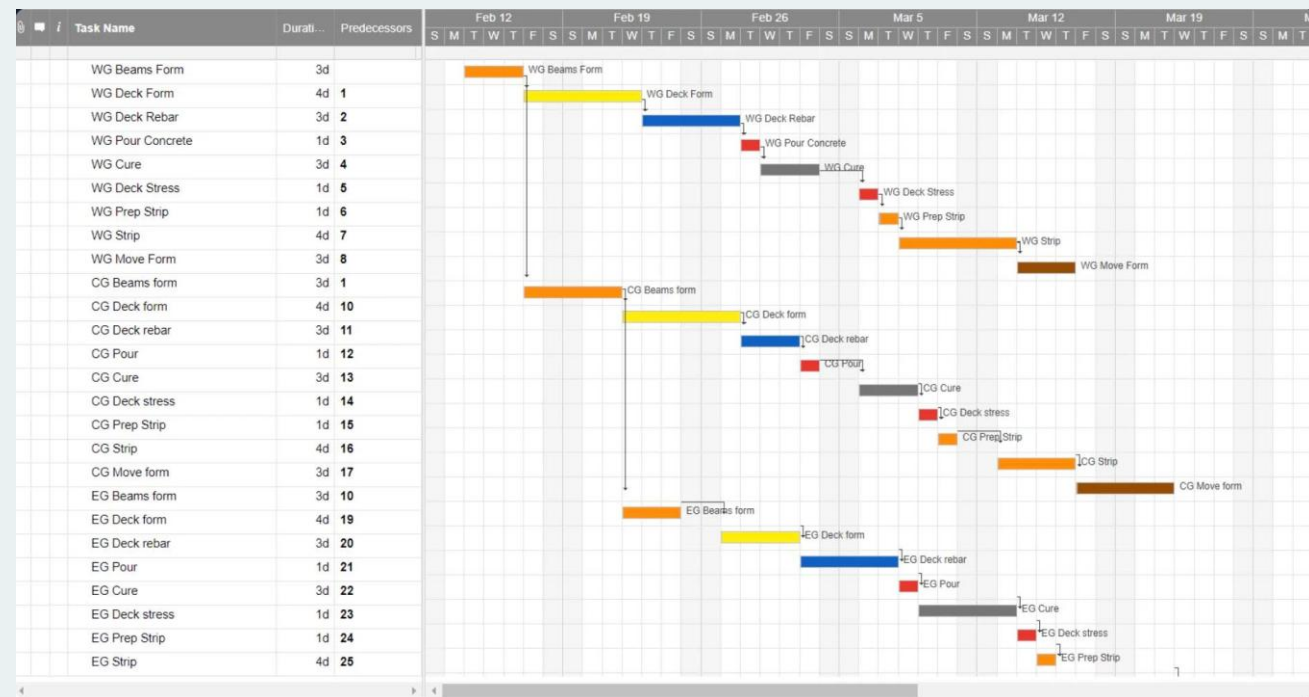
Root Cause Analysis

- Determine underlying issues
 - Contractor related
 - Owner related
 - Material related
- Separate symptoms from causes
 - Prevents recurrence: Fixing symptoms only postpones the problem; fixing root causes stops it from happening again
 - Directs resources effectively: Resources should focus on the underlying cause, not just the visible effect
- Engage all project participants



Developing a Recovery Plan

- Prioritize critical issues
 - Identify what must be completed for operation
- Establish corrective actions
 - Assign responsibilities with timeline
 - Frequent follow up
- Assign accountability
- Assign approval paths



Leadership During Project Challenges

- Maintain transparency with all stakeholder
- Make timely decisions
- Focus on solutions, not blame



Project Recovery Success Framework

- Assess current project status
- Implement corrective actions
- Monitor and communicate progress

Key Take Away

Prevent

- Establish clear project goals and success criteria.
- Define roles, responsibilities, and decision-making authority.
- Develop realistic budgets, schedules, and contingencies.

Detect

- Monitor key performance indicators (budget, schedule, quality, safety).
- Identify warning signs early, such as excessive RFIs, change orders, missed milestones, or stakeholder complaints.
- Conduct regular project status reviews with the design and construction teams.

Correct

- Perform a root-cause analysis.
- Develop and implement a recovery plan with measurable actions.
- Communicate openly with stakeholders and track progress until the project is stabilized.



Hugo Avila, PE

Thank You