

2014 VA Co. Achievement Awards

Deadline: June 2, 2014

Application Form

All applications must include the following information. Separate applications must be submitted for each eligible program. **Deadline: June 2, 2014.**

Program Information

Locality Fairfax County

Program Title Project Manager Guide

Program Category Organizational Development

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Overview

Fairfax County Building Design and Construction Division (BDCD) of the Department of Public Works and Environmental Services successfully developed an online, local server, Project Manager Guide (PM Guide) for building projects defined in the Capital Improvement Program (CIP). Due to the population growth Fairfax County has experienced in the last decade, demand for new and renovated public facilities, including fire stations, libraries and human services facilities, BDCD's workload has increased. The creation and implementation of the PM Guide established standard processes and procedures to be used by BDCD staff to ensure a high level of performance, consistency and efficiency in the delivery of a successful building project. The PM Guide includes design checklists for each project phase. References, sample documents, and lessons learned from completed projects are updated frequently to promote continual improvement in the execution of BDCD project management. A Master Toolbox section is included to provide important information on many building design/construction and project management subjects such as utilities, budget and schedule. Having the steps of building project development clearly defined, enables Project Managers (PM's), both new and experienced, to be proactive, independent, and ultimately prevents costly time delays and reduces possible budget impacts. The PM Guide is an easy to follow resource for the process and paperwork necessary to guide project managers to a successful project completion.

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1 The Problem/Need for the Program

The Fairfax County Building Design and Construction Division aims to be the “provider of choice” for Fairfax County capital projects and strives for continuous improvement to meet the mission, vision, and values of the organization. In recognition of those goals, a standard for operating procedures and tools for the project managers were needed. As a government agency, it is extremely important to follow the rules and regulations for public works projects. The ultimate owners are the citizens of Fairfax County and it is the responsibility of staff to implement projects in a conscientious and judicious manner. While our project managers work independently, every project must have certain consistencies, particularly concerning procurement regulations, financial approvals, ADA regulations, etc. Information and documentation saved in many different locations and formats created inefficiencies, when trying to determine how a task was previously performed and/or what required. The process was harder for new employees to grasp and, even for experienced employees, took extra time to complete.

Due to the population growth Fairfax County has experienced in the last decade, demand for new and renovated public facilities, including fire stations, libraries and human services facilities, BDCD’s workload has increased. In addition to a growing number of typical projects and new employees, the Public/Private Partnership Branch (P3B) was created in 2013 within BDCD to manage large projects and public/private partnership projects for Fairfax County. A consistency was not only needed for one area of the organization, but also to provide consistency between branches of the organization. The solution to organizing and streamlining BDCD’s delivery of first class building projects was to gather this cumulative process and document information into a one-stop online location.

Project managers can now efficiently find the information they need without having to spend time searching for the last example or seeking the next step. A guide provides the vital tool for making crucial process information readily available for project managers to perform their jobs successfully.

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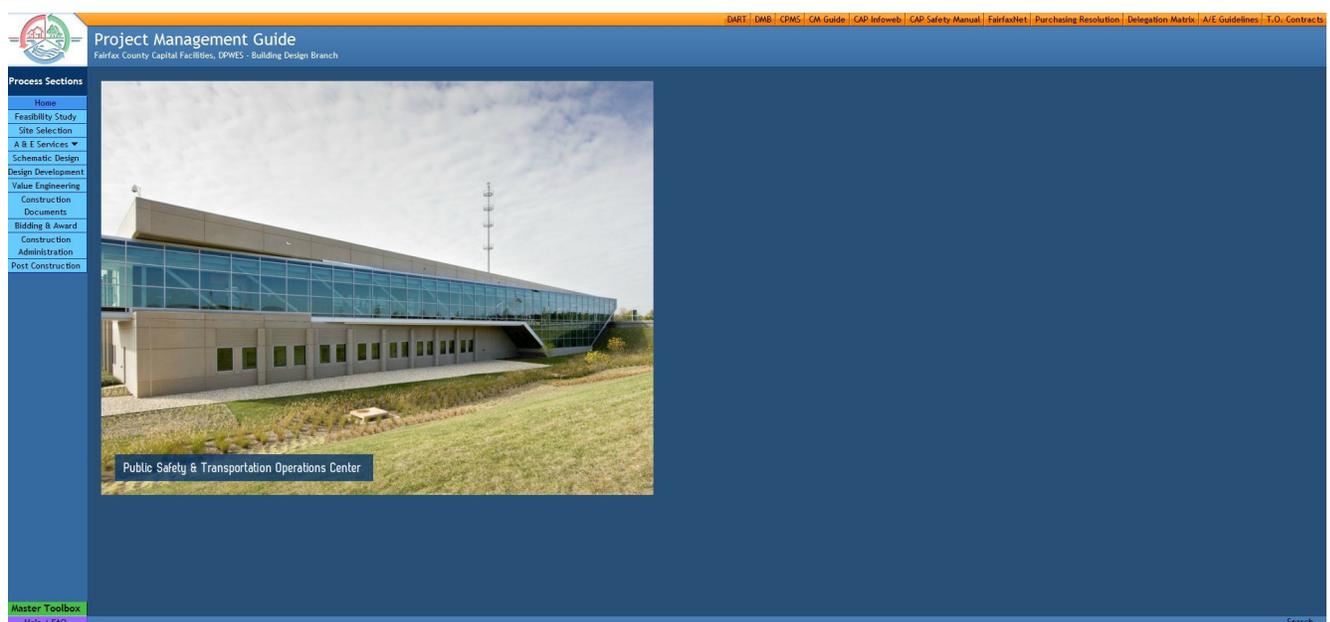
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2 Description of the Program

The Building Design Branch (BDB) within BDCD developed an informative Project Management Guide that contains the information needed for managers for the successful planning, design, and construction of building projects. The PM Guide is readily available to all BDCD staff online through the Fairfax County local server and is formatted similar to standard web pages to make it simple and efficient to operate with its pull-down menus and information bars.

The PM Guide has two major components on the main page: Process Section and the Master Toolbox. This page also has an information bar with tabs that provides quick links to often used reference documents such as Delegation Matrix that designates approval levels required for contract and purchasing dollar amounts, Sustainable Development Policy, and Value Engineering Policy.

Below is a screenshot of the main page of the Project Management Guide:



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The Process Section lists all the phases of a project starting from Feasibility Study to Post Construction. By simply clicking on a phase, a detailed checklist is provided that guides the project manager through that particular phase from start to finish. The checklist provides a breakdown of each step within the process and includes Templates of documents that are used in that step. The project manager can then simply modify these documents to fit their current projects saving time. These sample templates are updated when new forms and improvements become available. References are also included in each step of the Checklist that link the project manager to additional information. References include informational items such as Overhead Rate Review Process, Approval of Certificate of Liability Insurance, and Recommended Grossing Factors.

The Checklist section of the PM Guide provides a step by step guide of how to manage a project from beginning to end and provides a single location for templates and references. The Checklists are constantly updated to ensure that the project managers are provided with the latest information available to successfully manage their projects.

The following is a screen shot of a Schematic Design Checklist of the Process Section with the identified Templates and References:

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The screenshot displays the 'Project Management Guide' web application. At the top, an orange 'Information Bar' contains navigation tabs for DART, DMS, CPMS, CM Guide, CAP Inflow, CAP Safety Manual, FairNet, Purchasing Resolution, Delegation Matrix, A/E Guidelines, and T.O. Contracts. The main content area is titled 'SCHEMATIC DESIGN' and is divided into three sections: 1. Project Kick-off Meeting, 2. Space Programming, and 3. Conceptual Designs. Each section includes detailed bullet points and lists of 'TEMPLATES' and 'REFERENCES'. A left-hand 'Process Section' menu lists various project phases from Planning to Post Construction. A 'Master Toolbox' is located at the bottom left of the main content area. Annotations with arrows point to the 'Information Bar', 'Process Section', 'Master Toolbox', and the 'TEMPLATES' and 'REFERENCES' boxes on the right side of the page.

Also included in the PM Guide is a permanent information bar of tabs across the top that link the manager to other important and useful County information such as the Purchasing Resolution, Delegation Matrix and Task Order Contracts.

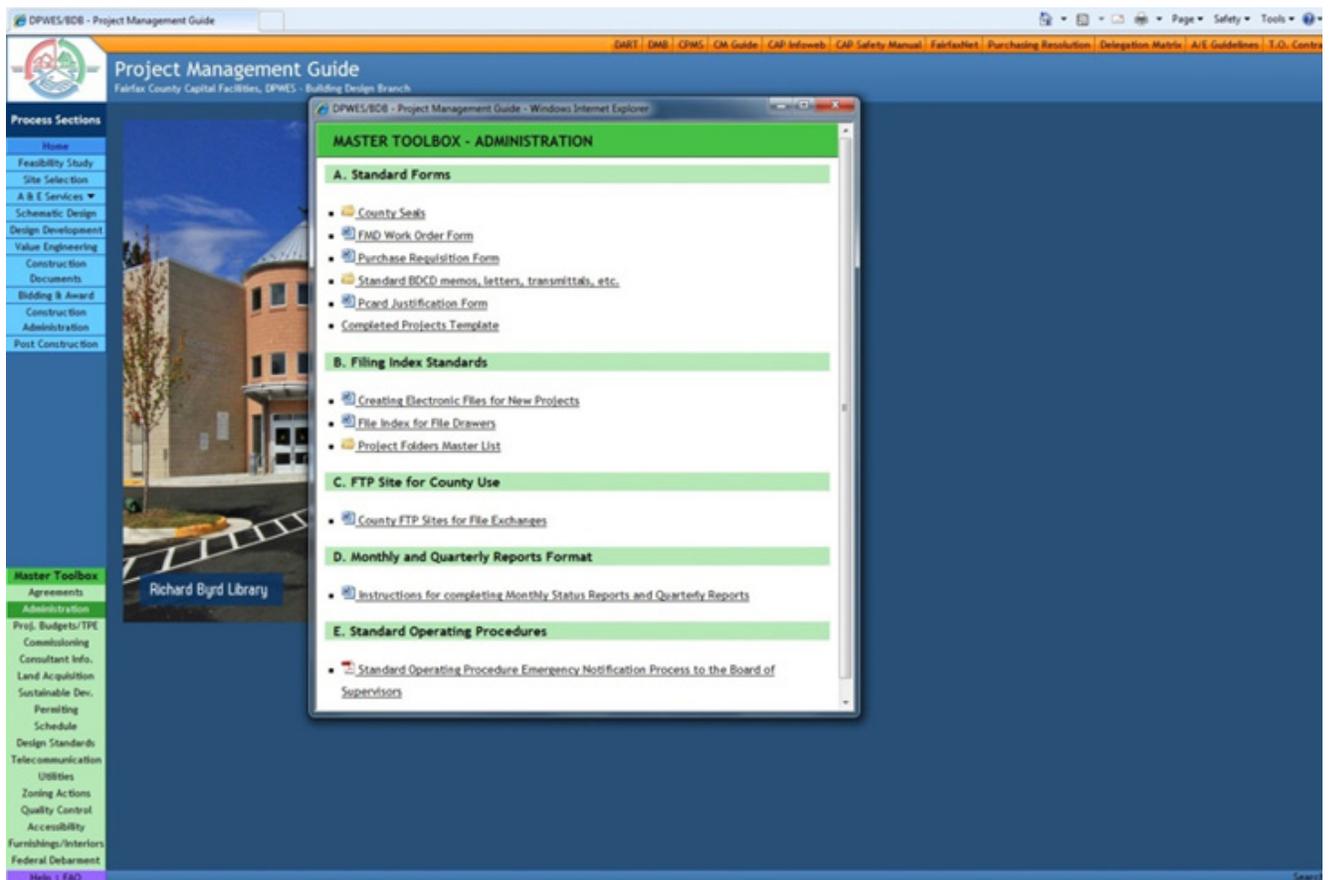


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The Master Toolbox includes information on major subject matters that are integral to a building project's success such as Administration, Budgets/Total Project Estimate (TPE), Land Acquisition, etc. Each Master Toolbox tab opens a list of documents divided into major categories such as Historical Cost Data on the Budget/TPE tab and Easements on the Land Acquisition tab. Often information is stored in various locations within an organization and at times it is difficult to find or know if it is the latest. Controls are maintained on the PM Guide to ensure that the information provided is accurate and update to date.

Below is a screen shot of a Master Toolbox tab with links:



The screenshot displays the Project Management Guide website interface. The main content area is titled "MASTER TOOLBOX - ADMINISTRATION" and is divided into five sections (A through E), each with a list of links:

- A. Standard Forms**
 - County Seals
 - FMD Work Order Form
 - Purchase Requisition Form
 - Standard BODD memos, letters, transmittals, etc.
 - Board Justification Form
 - Completed Projects Template
- B. Filing Index Standards**
 - Creating Electronic Files for New Projects
 - File Index for File Drawers
 - Project Folders Master List
- C. FTP Site for County Use**
 - County FTP Sites for File Exchanges
- D. Monthly and Quarterly Reports Format**
 - Instructions for completing Monthly Status Reports and Quarterly Reports
- E. Standard Operating Procedures**
 - Standard Operating Procedure Emergency Notification Process to the Board of Supervisors

The left sidebar contains a "Process Sections" menu with options like Home, Feasibility Study, Site Selection, A & E Services, Schematic Design, Design Development, Value Engineering, Construction Documents, Bidding & Award, Construction Administration, and Post Construction. Below this is a "Master Toolbox" menu with categories such as Agreements, Administration, Proj. Budgets/TPE, Commissioning, Consultant Info, Land Acquisition, Sustainable Dev., Permitting, Schedule, Design Standards, Telecommunication, Utilities, Zoning Actions, Quality Control, Accessibility, Furnishings/Interiors, and Federal Debarment. A search bar is located at the bottom right of the page.

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The PM Guide has achieved the objective of organizing and standardizing the processes, information and forms necessary for successfully completing each phase of a project. The result has been more efficient use of managers' time, more precise project budgets and consistent quality of contracts, correspondence, and quality facilities.

Due to budget constraints, using an outside vendor to create a PM Guide was not an option. The PM Guide was carefully planned and developed by a project team made up of BDCD staff with information technology support from the Administrative Support Branch. An outline of basic information needed and set-up was agreed upon first. At that point each Process Section and Master Toolbox Section were given to different teams of project managers (2 to 3 project managers per team). Their task was to determine the Checklist steps and find the appropriate Templates and References to include. Concurrently, a team researched the software needed to construct the webpage. They also worked with the Department of Information Technology to ensure that what was constructed was in compliance with Fairfax County policies and standards. A BDB project manager with website design experience created a professional, attractive, and remarkably intuitive main page and in a format easy to update.

Updating Checklist information and adding/editing Templates and References are simple to accomplish in this system. However, access to editing the PM Guide is strictly controlled in order to maintain the integrity of the information in the PM Guide.

The process of "building" the PM Guide took about a year and has been in use since September, 2011. It continues to be a "living document" with additions and edits being made as needed. New project managers to BDCD have commented that the PM Guide has been extremely useful and has made a significant impact on how quickly they have been able to come up to speed in managing projects. All project managers have valued the tool for its abundance of information in a single user friendly manner.

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3 Responding to Economic Downturn

The economic downturn of the last several years, coupled with the growth in County population, has impacted the workload of all employees in BDCD. Project managers have been required to take on more projects and responsibilities than had been assigned in the past. The PM Guide is a tool for project managers to maintain project schedules and has resulted in more efficient time management. In addition to quickly finding required administrative forms and templates, project managers use the PM Guide to gather complex historical financial data quickly. This feature has aided project managers in their contract negotiations for the County.

4 Use of Technology

The technology required to maintain the PM Guide includes the following software: Adobe Professional, Adobe Contribute, Adobe Photoshop, Adobe Dream Weaver and Adobe In-Design. This software requires thorough knowledge of HTML, CSS, scripting and current ADA standards. The PM Guide is hosted on the County's internal intranet (LAN). The files reside on a secure County web server viewable only to BDCD employees. The content in the PM Guide is carefully vetted and controlled so that project managers will find the most current and accurate information and forms available.

In addition to easily accessed Phase Checklists and References, the PM Guide easily links managers to several County-wide internal website databases such as FairfaxNet, A/E Guidelines, and Task Order Contracts. It also links to BDCD in-house data bases such as historical cost data, Consultant evaluations, and permit expirations. The main page and Phase Checklist pages have been designed to be intuitive and simple to navigate.

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5 The Cost of the Program

First year costs related to building and deploying the PM Guide are estimated to be at \$16,500. The bulk of the costs were associated with staff resources dedicated to the program's development and implementation. Software licensing fees for the software suite, which included Contribute, InDesign, Adobe Professional, and Adobe Photoshop, was \$3,500. Staff costs associated with the development of the PM Guide was estimated at \$13,000. If the County had not had the internal expertise to develop the PM Guide, hiring an outside company to develop and maintain it would have cost an estimated \$50,000.

The County anticipates minimal recurring annual costs of \$3,000 to support and update the PM Guide. Future savings to the County will also be realized since additional funding for modifications/changes from outside consultants is not required, thus increasing the value and benefit of this program.

6 The Results/Success of the Program

The PM Guide was implemented for use in September 2011. The Administration Support Branch installed a PM Guide shortcut icon onto all BDCD managers' computer desktops for quick access. Project managers immediately began using the online PM Guide to get acquainted with all of the information that was available. Any issues with content were brought to the PM Guide development team and corrections and updates were made, as needed. Before long the PM Guide became a valuable resource for all project managers.

The online PM Guide has resulted in the consistency of high quality project delivery for the end user. All project managers follow the Phase Checklists and are able to manage multiple tasks on multiple projects without losing momentum. Project budgets are better managed, days in review have been reduced, and project managers' time is spent more efficiently.

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The photo below depicts the Hose Drying Tower Interior that has been built to specifications in the Fire Station guidelines found in the PM Guide. The metal spiral staircase and the recessed landing with balcony have been built according to specific design requirements.

The PM Guide is especially helpful for new employees. Out of the 11 current project managers, over half have been with Building Design Branch for less than two years. The PM Guide is part of the new employee orientation and has provided a consistency and level of training that would have been difficult to accomplish with so many new project managers. According to one of the newest Project Managers, "Starting a new job is always stressful without the added on stress of not knowing how things work in the new place. The PM guide is the go-to place where the framework is very easy to follow and the



Wolftrap Fire Station Hose Drying Tower Interior

processes are explained very well with project management templates and project documents for reference. It is a time saver as it has all the historical data for projects which would otherwise take a lot of research and time and the best part is that it is constantly updated." Several have commented that the multi-faceted BDCD Building Design process has been much easier to understand and implement using the information in the PM Guide. The PM Guide has empowered the project managers to effectively manage projects and often add their own value to it by suggesting improvements. There is much appreciation in having the tools needed to do their job more proficiently.

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7 Worthiness of an Award

The BDCD PM Guide is a complex and innovative tool that has transformed how project managers manage the Capital Improvement Program (CIP) for the design and construction administration of building projects for Fairfax County. In an economic era of doing more with less, the PM Guide has created consistency in implementation of the process and has enhanced project managers' productivity by having the processes and documents all readily available in a single organized location. Numerous Fairfax County facilities have reached an age where major renovations are required to meet the changing space program needs and updates are required to the various building systems that have reached their useful life. New facilities are also needed to meet the needs of the growing County population. To address the increase in workload with no appreciable increase in level of workforce due to the tight economic reality, innovative solutions are needed to achieve the consistent level of project success. The PM Guide has benefited project managers, all of whom manage multiple projects, from the quick and clear direction found in the document. The PM Guide has been a valuable tool in the training of new employees and has improved the process for all project managers. Project managers who are new to BDCD have appreciated the reliability of information they find in the PM Guide. Even more experienced project managers have found the PM Guide to be a helpful resource for information about processes that are not performed often.

BDCD implements the CIP for building projects for multiple Using Agencies of Fairfax County. The PM Guide has improved the administration of this program by creating efficiency and consistency to better implement the process of design and construction of building projects. The PM Guide benefits the residents of Fairfax County by providing a tool to project managers for the delivery of quality public facilities in a consistent and timely way.

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