



Joint City-Schools Facility  
Investment Task Force:

*Capital Project Planning  
& Implementation  
Subcommittee Meeting 1*

Best Practices Briefing | August 29, 2017



# Agenda

- Introduction & Objectives
- Industry Standards & Definitions
- Project Life Cycle
- Planning & Implementation Considerations
- Discussion



# Capital Project Planning & Implementation

## Subcommittee

- Elliott Branch, Chair
- Marshall Cook
- Eric Wagner

## Subcommittee Objectives

- Review and recommend governance of capital planning and project delivery methods relative to the City of Alexandria and Alexandria City Public Schools facility projects
- Consider co-location and civic engagement principles as applicable to this subcommittee topic



# Introduction

Meeting Objectives



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## Introduction: Meeting Objectives

### Objectives

- ◆ Common vocabulary and clarification of terms
- ◆ Industry standards as context and identification of sub-committee focal points for research and discussion
- ◆ Clarify/Discuss current City and ACPS processes and procedures



# Introduction

Industry Standards & Definitions



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## Introduction: Industry Standards & Definitions

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**PMI**

**Project Management Institute**

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**CMAA**

**Construction Management  
Association of America**

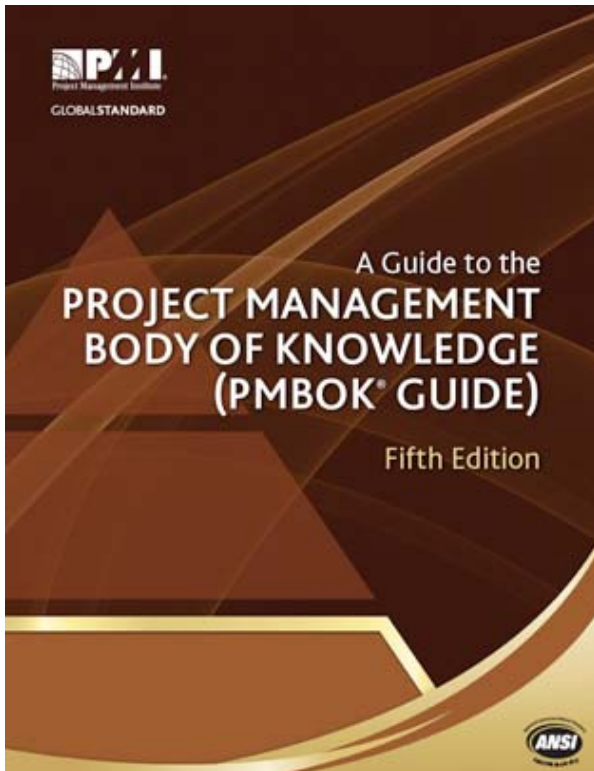
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See Hand Out

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## Introduction: Industry Standards & Definitions

### Project Management Institute (PMI)



**Mission:** To advance the practice, science and profession of project management through the world in a conscious and proactive manner.

**Relevant Text:** Project Management Body of Knowledge (PMBOK Guide)

- *Intended to identify that subset of the project management body of knowledge generally recognized as good practice, and to provide a common vocabulary within the project management profession.*

**Certification:** Project Management Professional (PMP); among others.

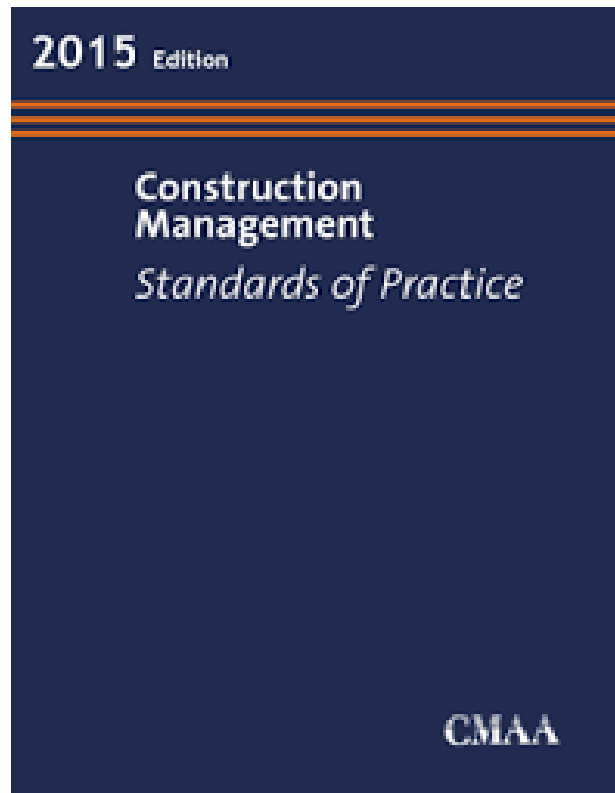




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## Introduction: Industry Standards & Definitions

### Construction Management Association of America (CMAA)



**Mission:** To promote the profession of Construction Management and the use of qualified Construction Managers on capital projects and programs.

**Relevant Text:** Construction Management “Standards of Practice”

- *Intended to establish industry standards of service and serve as a guide to the range of services that constitute professional Construction Management*

**Certification:** Certified Construction Manager (CCM); Construction Manager in Training (CMIT)



# Introduction

## Project Life Cycle



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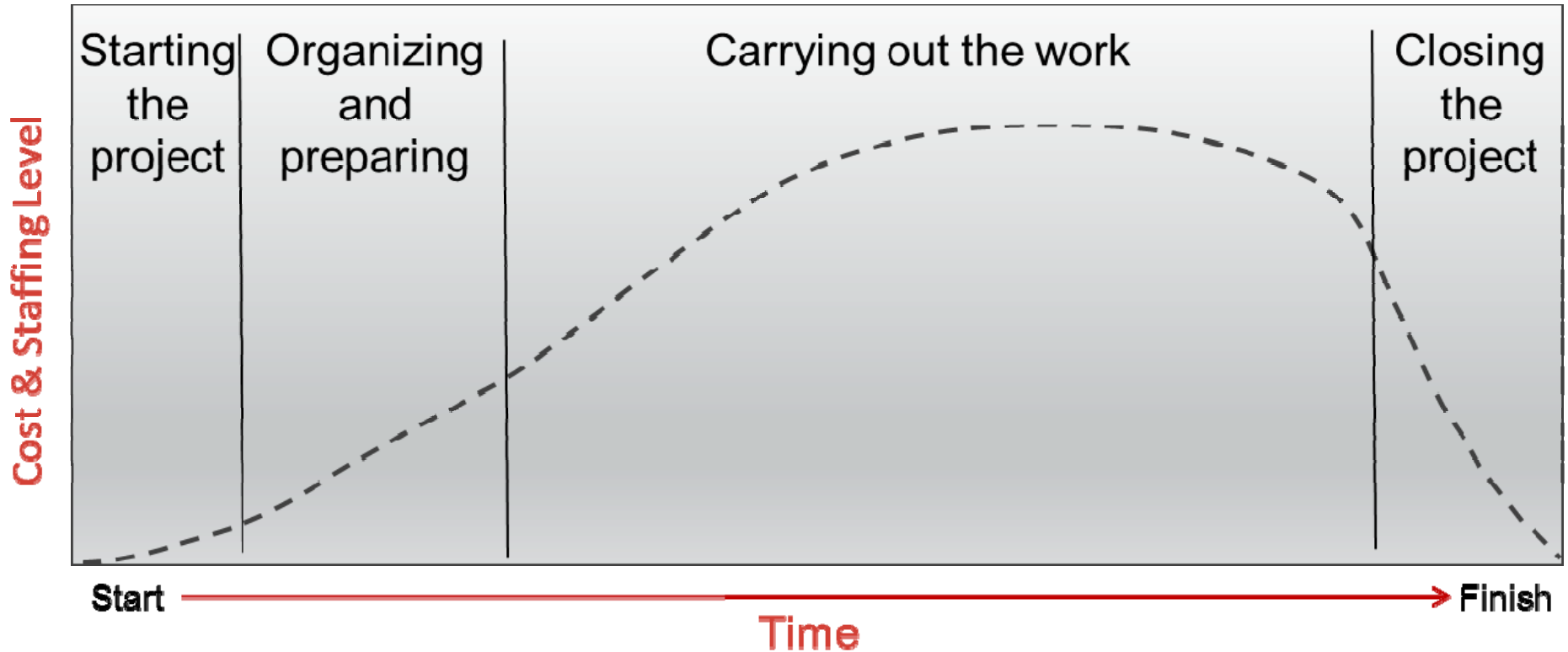
## Project Life Cycle: Project Drivers



The management of a project is focused primarily on controlling the interrelationships of key project drivers "Cost", "Time" and "Quality", which directly impact the overall scope of the project. Secondary influences are contract administration, safety, program management, sustainability, risk management, and building information modeling.

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## Project Life Cycle: Characteristics

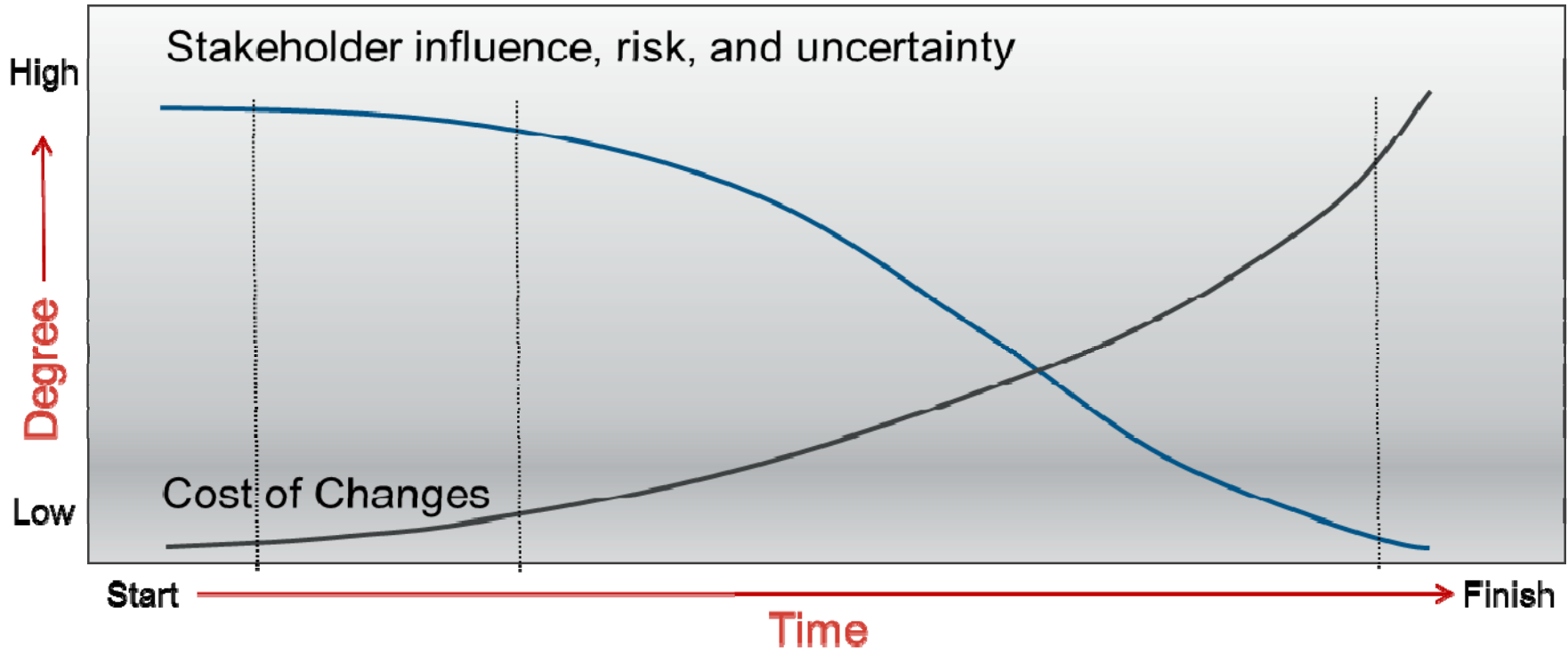


*Each project typically exhibits the characteristics above, however the cost & level of effort associated with each characteristic will vary depending upon the project requirements.*

Source 1: Project Management Institute - PMBOK Guide

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## Project Life Cycle: Ability to Influence Project Outcomes

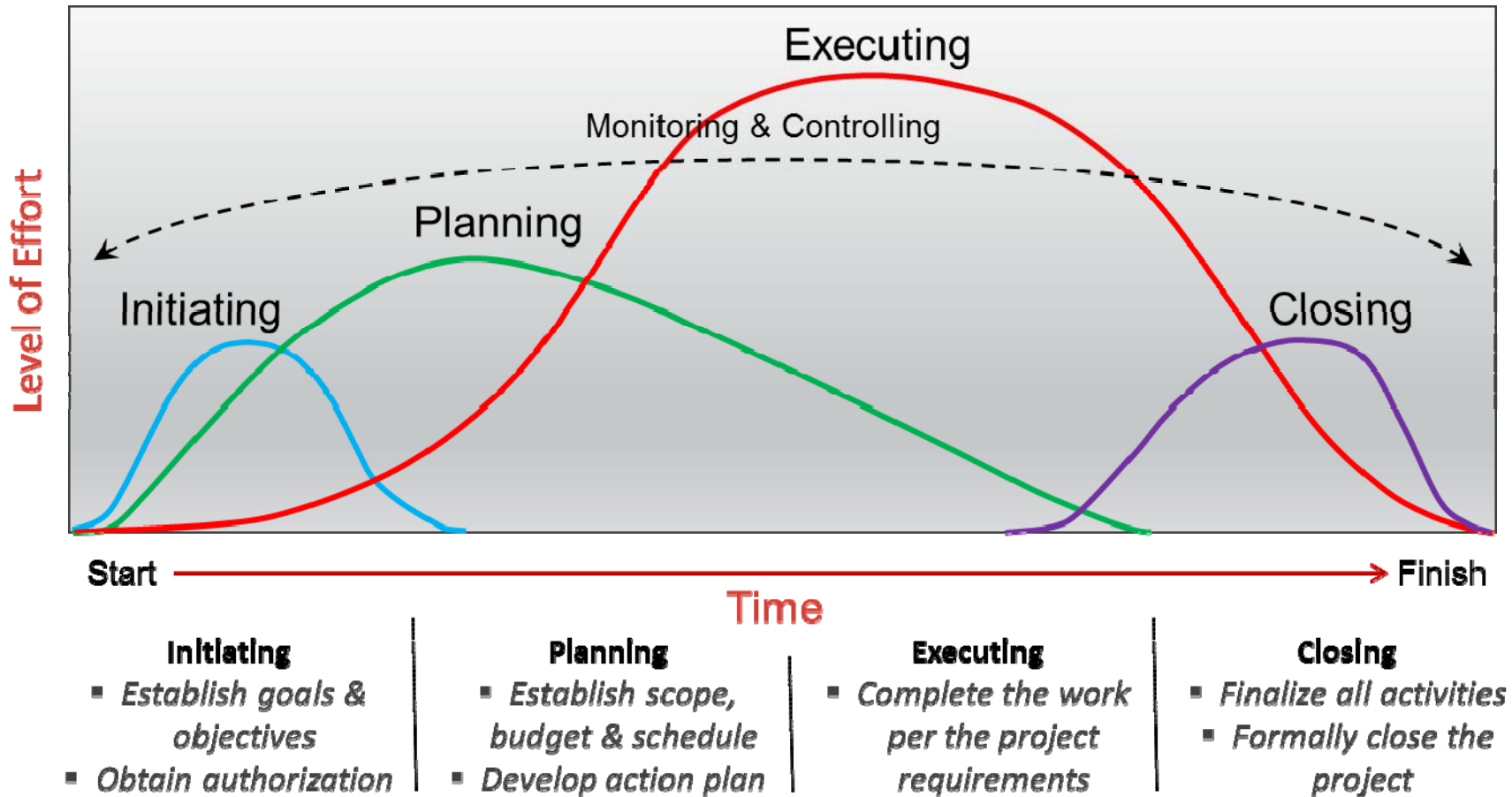


*The ability for stakeholders to make changes to the project requirements is highest at the initiation of a project, however, risk and uncertainty are also the greatest. As a project progresses through the project life cycle – risk and uncertainty decrease, however, the impact and cost of making changes increases.*

Source 1: Project Management Institute – PMBOK Guide

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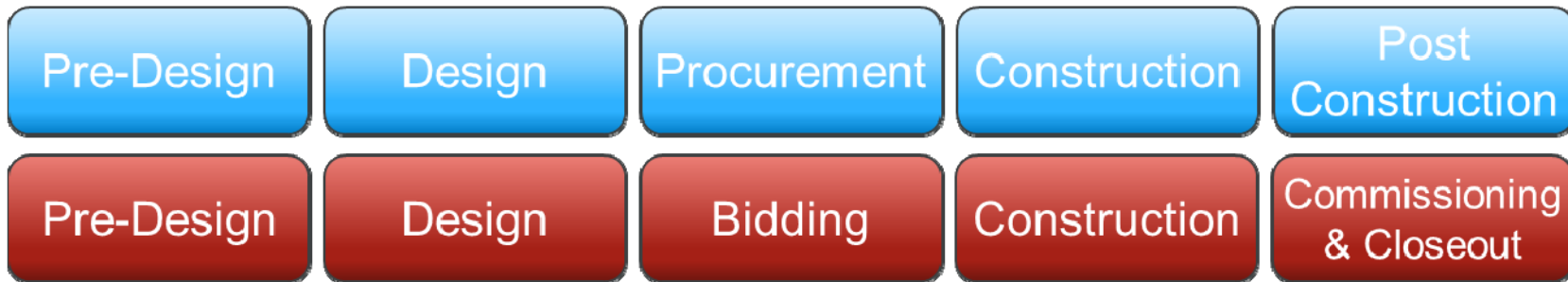
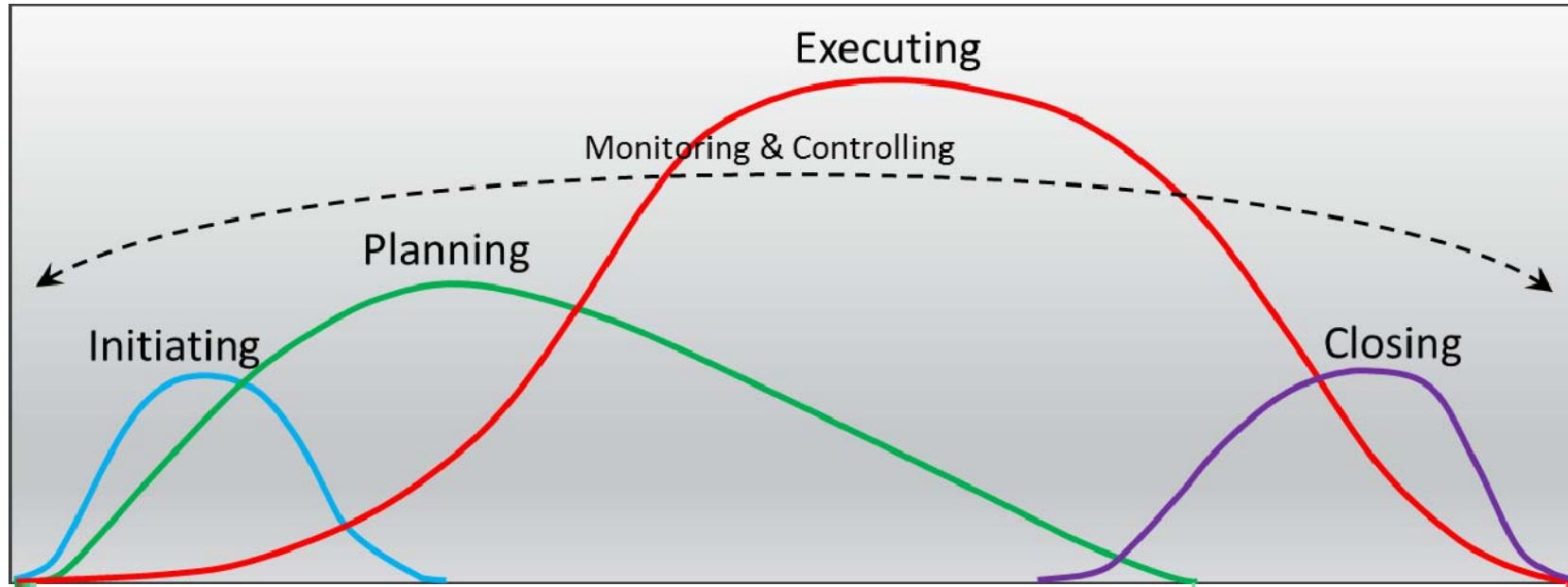
## Project Life Cycle: Process Groups



Source 1: Project Management Institute – PMBOK Guide

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## Introduction: Industry Standards & Life Cycle Overlay



Other Typically Used Terms

# Considerations

Aligning Capital Project Implementation  
Across an Organization







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## Introduction: Industry Standards & Definitions

### Considerations:

- ◆ Governance
- ◆ Project Management
- ◆ Financial

See Hand Out

# Current City and ACPS Practices and Processes



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## City CIP Process

- **Summer**
  - CIP Budget Kick-Off: Department heads develop, submit initial project requests
  - Full project submissions due from departments
- **Fall**
  - OMB review of project submissions
  - Peer Technical Review Committee and CIP Steering Committee begin meeting
- **Winter**
  - CIP Steering committee develops recommendation to City Manager
  - CIP Steering Committee presents recommendation to City Manager
  - City Manager finalizes decisions on proposed CIP and presents CIP to City Council
- **Spring**
  - City Council and City staff hold budget work sessions
  - BFAAC and Planning Commission provide recommendations and guidance
  - City Council conducts add/delete process – adopts operating budget
- **Quarterly**
  - City staff compile a Capital Projects Status Report each quarter to provide an update to City Council on active CIP projects

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## ACPS CIP Process

- **Summer**
  - CIP Budget Kick-Off: Facilities begins initial project list using assessments and knowledge of facilities' needs and consideration for the previously approved 10-year CIP.
  - Projects are reviewed by additional staff and Superintendent; School Board holds a Public Hearing on the CIP. School Board holds a series of work sessions and passes Budget Process Resolution, Budget Rules of Engagement and School Board CIP Budget Priorities
- **Fall**
  - Superintendent's proposed CIP is finalized and presented to the School Board. Staff holds a Public Forum to receive additional community input.
  - School Board has a series of work sessions to discuss the CIP.
- **Winter**
  - School Board prepares add-deletes, holds a public hearing on the CIP and adopts a final ten-year CIP
  - City Manager finalizes decisions on proposed CIP and presents CIP to City Council
- **Spring**
  - City Council and City staff hold budget work sessions
  - City Council conducts add/delete process – adopts CIP budget, School Board goes through a series of add-deletes to accommodate City Manager approved budget. (Note that City Council approves a 10-year CIP and appropriates for the first year of the 10-year CIP. The School Board ultimately decides which projects to fund with appropriated funds each year and may adopt a final ten-year CIP that does not align with the approved budget in the second to tenth year of the City Council approved CIP.)
- **Quarterly** - ACPS staff compile a Quarterly CIP Report to provide an update to School Board on active CIP projects.
- **As Needed** - For the most significant construction projects, ACPS staff will often provide either standing or as requested updates at School Board meetings.

# Wrap Up & Next Steps

## Discussion Questions

1. What existing processes and protocols do you want do you want to learn more about?
2. What questions do have on specific projects?
3. Are there themes or categories related to the questions you have that we can relate back to governance or project management topics?

