



PROJECT PROCESS

1 Initiation

- a. **Client** submits a service request through the Campus-Wide Login (CWL) — www.msp.ubc.ca
- b. **Project Manager** assigned to the project.
- c. **Client** and **Project Manager** discuss the project objective, scope, and requirements.

2 Planning

- a. **Client** and **Project Manager** develop the project charter and feasibility estimate and preliminary schedule.
- b. **Client** confirms secured funding.
- c. **Client** reviews and provide sign-off of the feasibility estimate.

3 Design

- a. **Client, Project Manager, and Procurement Officer** work together to engage a suitable Consultant.
- b. **Project manager** initiates design kick-off meeting with the Client, Consultant, and other UBC stakeholders.
- c. **Consultant** develops the design based on the information provided by the Client, Project Manager, and UBC stakeholders.
- d. **Consultant** presents the design to the Client, Project Manager, and UBC stakeholders.
- e. **Consultant** and **Project Manager** apply for permits as necessary.
- f. **Project Manager** provides the client with revised cost estimates and schedule at relevant design milestones.
- g. **Client, Project Manager, and UBC stakeholders** provide feedback based on design solutions and cost estimates.
- h. **Client, Project Manager, and UBC stakeholders** approve the final design.
- i. **Client** approves the pre-tender estimate and schedule.

4 Procurement

- a. **Project Manager** and **Procurement Officer** select a suitable tender process.
- b. **Procurement Officer** issues a tender for a project.
- c. **Procurement Officer, Project Manager, and Consultant** review and evaluate tender submissions from contractors.
- d. **Project Manager** provides the Client with the post-tender estimate and award recommendations.
- e. **Client** reviews and provides final approval for post-tender estimate.
- f. **Procurement Officer** awards the contract.

5 Construction

- a. **Project Manager** and **Project Coordinator** work with the Client and other impacted parties to schedule work and manage construction impacts.
- b. **Project Manager** initiates the *Contractor's First Meeting* with the Client, the Contractor, Facilities Manager, Project Coordinator Communications Specialist, and other UBC stakeholders.
- c. **Contractor** executes the scope of work as designed.
- d. **Consultant** review work on site for adherence to the design documents.
- e. **Project Manager** and **Project Coordinator** monitors the contractor's progress throughout the project.
- f. **Consultant** and **Project Manager** monitor and manage changes to the contract scope.
- g. **Project Manager** provides regular updates to the Client.
- h. **Client** approves changes to the project scope as required.

6 Completion

1. **Consultant** and **Contractor** request regulatory inspections to fulfill permit requirements.
2. **Project Manager** schedules the *Substantial Completion Walkthrough* to review the work and identify potential deficiencies with the Client, Consultant, and Contractor.
3. **Contractor** corrects any deficiencies identified during the walkthrough.
4. **Project Manager** hand-over the completed project to the Client.
5. **Project Manager** submits the final cost report to the Client.



ROLES & RESPONSIBILITIES

The project team is comprised of key members who are involved in the development, implementation, and ongoing activities of a project. The following descriptions represent typical position titles and primary roles and responsibilities.

Client / Project Sponsor

The representative that requested and/or is funding a project. They will represent and approve project decisions, including scope, cost and schedule on behalf of the faculty, department, or group. The client works closely with the project manager throughout the project to identify project needs and potential impacts to building users during construction.

Project Manager

The project manager works with the client to determine the project objective, scope, timeline, and budget. They are responsible for managing the success of a project from inception to completion, through planning, design, construction, and commissioning. They are the liaison between the client, consultant, contractor, other UBC stakeholders and the UBC community in general.

Project Coordinator

The project coordinator works with the project manager to assist and facilitate day-to-day site coordination related tasks. This includes coordinating with contractors, consultants, UBC service providers, and the campus community – street closures, shutdowns, key access, service requests, etc.

Project Administrator

The project administrator works with the project manager to assist with project related duties. They oversee and perform administrative functions concerned with a project – contracts, invoices, change orders, fee amendments, etc.

Procurement Officer

The procurement officer works with the project manager to issue a suitable procurement process for all project acquisitions. They are responsible for executing all procurement services for a project, primarily focused on managing procurement processes over \$25,000.

Communications Specialist

The communications specialist works with the project manager, facilities manager, and the client to identify and implement an appropriate communication strategy for a project. This includes identifying the project-specific concerns during construction, and providing timely updates, notifications, and signage for a project.

Client Relations Specialist

The client relations specialist manages information databases and client contacts to build strong client relationships. Upon project completion, the client relations specialist will conduct a one-on-one client survey to measure customer satisfaction and receive feedback.



Facilities Manager — UBC Building Operations

The facilities manager provides customer service to the client, and specific context and history of a facility to the project manager. This includes supporting the client and project manager throughout the project lifecycle — assisting in identifying impacts to occupants within the building and surrounding buildings, and serve as an on-going first point of contact for the client.

Consultant — External

The consultant is an architect or engineer, hired externally to provide their expertise in planning and design for a project. This includes creating site design plans that meet the needs of the client and adhere with all UBC policies and regulations. They also provide oversight during construction within their specialty to ensure adherence to the contract documents and manage change orders as required.

Contractor — External

The contractor is selected through a procurement process to ensure that the client receives the most qualified contractor and competitive pricing for a project. The contractor manages the construction process from start to finish, and ensuring all work is performed according to contract documents, regulatory, site safety, and quality requirements.