DIRECTORATE OF ESTATES AND FACILITIES

PROCEDURE AND INFORMATION MANUAL

EPM PM2 – Project Allocation and Project Monitoring Process

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Project Allocation and Project Monitoring Process

Background

The Project Allocation (PA) process was developed to ensure the Directorate was able to deal with all requests for project work in a systematic and consistent manner. The Project Allocation group meet on a weekly basis in order to allocate all new projects and to ensure all recently allocated projects have a Project Manager appointed in a timely manner. All matters are presented on a PA sheet (Appendix 1) and are allocated to one of 4 Units for delivery or technical advice, following the flow chart detailed in Appendix 2.

The following criteria are used to inform the allocation of projects.

CPU

All new build projects and refurbishment projects of a complex nature or with a value generally in excess of £2M are allocated to the CPU.

MSU

Projects with little or no design input, non complex, up to a maximum value of circa 25k are allocated to MSU.

DSU

Projects that include a design element with a value between £25k and £2M are generally allocated to DSU. DSU also undertake requests for initial feasibility studies for all projects with a design element.

CSU

Projects are allocated to the CSU action list for technical advice in the event a helpdesk request cannot be resolved. CSU, in addition, evaluate whether the project fits in with the strategic objectives of the Directorate ensuring that any underlying design issues, either legacy, or as a result of a project outside any design liability have been met.

Project Monitoring

Following successful navigation of the PA process, a project is monitored through the delivery stages via the Project Monitoring (PM) meetings. Projects are raised on the PM agenda and are discussed on a monthly basis. They are also subject to further scrutiny via the Directorate Project review process. This is also a monthly process where PM's are invited to come along and present their projects to the Directorate Senior Management Team.

It is also the intention of this paper to outline a further process of internal project peer review across all projects. This is designed to ensure a level of consistency across project standards and delivery. An example agenda for these meetings is attached (Appendix 3).
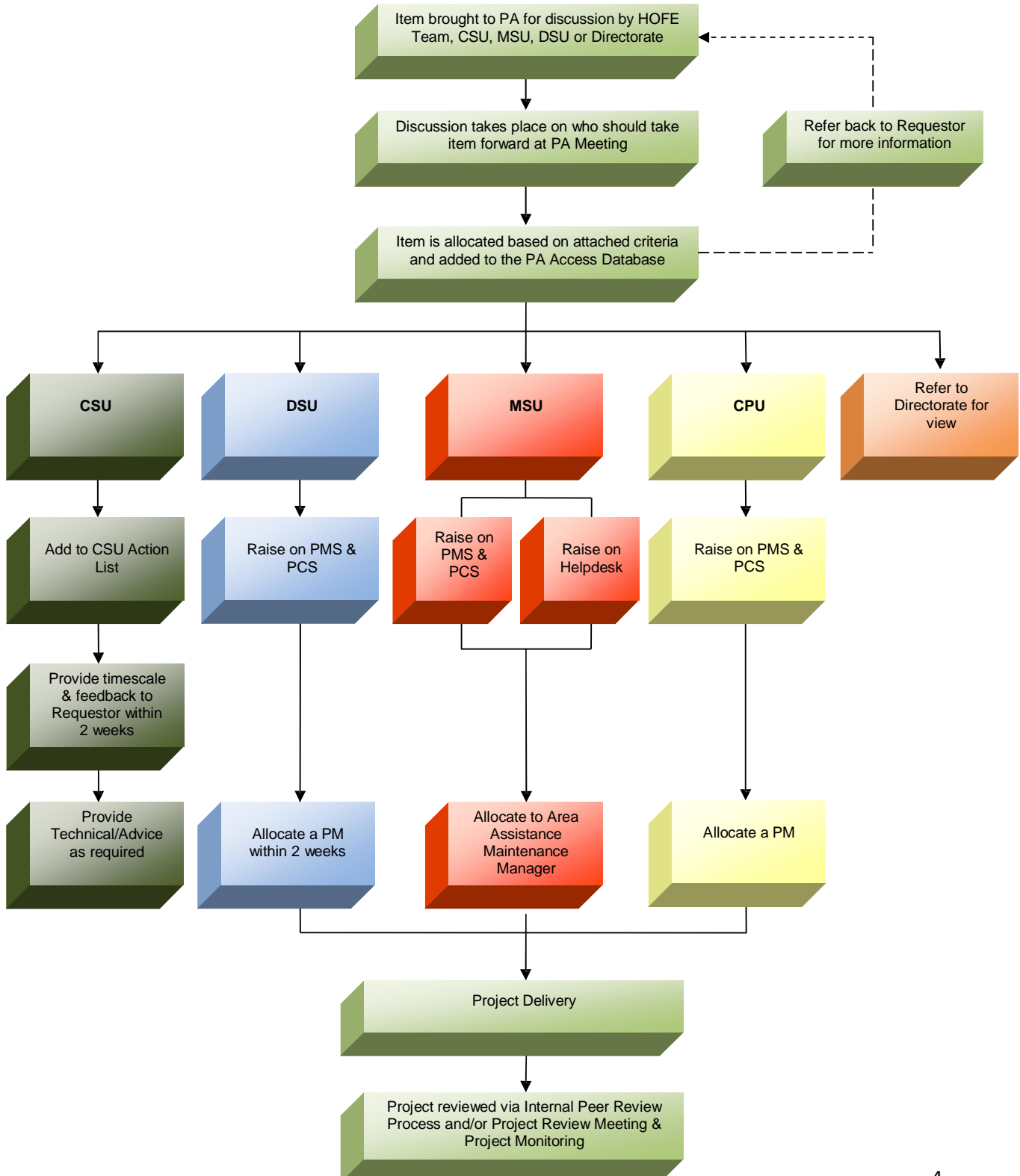
APPENDIX 1

Project Allocation – Project Request

To be submitted to the weekly Project Allocation Meeting – 10am every Wednesday

PA NUMBER:			
TO BE COMPLETED PRIOR TO THE MEETING			
RAISED BY: DIR / DSU / EPS / FLS-MHS / HUM-PSS / MSU / CSU		**DATE RAISED:**	
CLIENT: NAME AND DEPT:		**COMPLETION DUE:**	
BUILDING:		**ROOM:**	
BUDGET: AVAILABLE: YES / NO - AMOUNT: £		**FEASIBILITY ONLY:**	YES / NO
BUDGET AREA: LTM CAP / LTM REV / CSU SW / DIR SW / OTHER CAP / FACULTY / OTHER			
PROJECT TITLE:			
PROJECT DESCRIPTION AND DETAILS:			
FORM COMPLETED BY:			
ADDITIONAL DOCUMENTS ATTACHED:	YES / NO		
WILL THERE BE ANY DRAWING LAYOUT CHANGES:	YES / NO	IF YES, INFORM SPACE TEAM	
TO BE COMPLETED AT THE MEETING			
ALLOCATED TO:	CAP / DSU / MSU / CSU	**CLIENT REPRESENTATIVE:**	
TO BE RAISED ON:	HELPDESK / PM SYSTEM	**TO BE RAISED BY:**	

APPENDIX 2

Project Allocation & Project Monitoring Process

Item brought to PA for discussion by HOFE Team, CSU, MSU, DSU or Directorate

Discussion takes place on who should take item forward at PA Meeting

Refer back to Requestor for more information

Item is allocated based on attached criteria and added to the PA Access Database

CSU

DSU

MSU

CPU

Refer to Directorate for view

Add to CSU Action List

Raise on PMS & PCS

Raise on PMS & PCS

Raise on Helpdesk

Raise on PMS & PCS

Provide timescale & feedback to Requestor within 2 weeks

Provide Technical/Advice as required

Allocate a PM within 2 weeks

Allocate to Area Assistance Maintenance Manager

Allocate a PM

Project Delivery

Project reviewed via Internal Peer Review Process and/or Project Review Meeting & Project Monitoring

APPENDIX 3

INTERNAL PROJECT PEER REVIEWS

PROPOSED AGENDA

1. Meeting Objectives

2. Background to Project – Overview of Scheme

3. Project Directory and Communication procedures

4. Design Team Guide Compliance

5. Procurement Route-Evaluate (Quality of Tender Package, Specification, Drawings etc)

6.   Legislative/Statutory requirements
6.1   Planning Permission
6.2   Listed Building Consent
6.2.1 Conservation Philosophy
6.3   Building Regulation Approval

7. Health and Safety Issues – CDM compliance, Permit to Work, Contractor Monitoring

8. Sustainability Review. Assessment of Carbon impact of scheme.

9. Project Cost Appraisal - Cost Management – Forecasted spend profile, funding sources, specific requirements etc

10. Construction Quality – Clerk of Works reports

11. Programme and Programme Monitoring

12. Customer Care/Client feedback – Satisfaction Questionnaire

13. Next Review Meeting Date