

**Ralph J. Stephenson P.E. P.C.
Consulting Engineer**

January 27 ,1991

Philip M. Bennett RA
U of W Extension
Dept. of Engineering and Applied Science
432 Lake Street
Madison, Wisconsin 53706

Re: GSA PBS debriefing handouts and transparencies

Dear Phil:

Enclosed is the notebook package of material for the GSA PBS debriefing seminar to be held in San Antonio, Texas on February 11, 1991. I would appreciate if you would, in your usual excellent fashion, prepare the seminar notebook and transparencies from these.

The package consists of a discussion outline of 10 pages, 28 pages of handout material and a four page appendix, labeled Appendix A. Please feel free to add whatever other material you wish to this total packet wherever it appears best.

I think it would be very good if you would selectively transcribe the gist of your ideas you outlined to me and prepare an observation and recommendation appendix for the notebook. Please separately identify any added material so I can refer those attending to it easily. If transparencies will help in the presentation of your material, please have them made and let me know how you would like the information conveyed.

If it is at all possible please send me a notebook and the transparencies before I leave for San Antonio on Sunday, February 10, 1991. If not then just send the transparencies and my book along with the class notebooks to the hotel in San Antonio. I will plan to set the room up with the hotel staff on Sunday evening and would appreciate you making arrangements for me to get into the room that evening.

I presume the hotel and the audio visual supply people in San Antonio will have the equipment available on Sunday evening and will have a plan for the room arrangement. This I will leave in your capable hands, but of course will personally check out the teaching room when I get there Sunday.

It would be greatly appreciated if you could prepare transparencies for all the material in the notebook, even though I probably will use the discussion material overheads for the bulk of the work.

In the notebook it would be helpful to separate the three divisions with a colored tab sheet of heavy stock. If you have a section to add please place it

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wherever you feel it best fits in with the total book. Also I think it would be a good idea to insert a biographical sheet or two for each of us.

Meanwhile if there are any questions on the material I have sent you please call as soon as possible.

I'm looking forward to the session, although I'm going to miss your very valuable participation. Please ship me any of your ideas, thoughts, suggestions or insights that will help in this important presentation.

Thank you for your help.

Regards.

A handwritten signature in black ink, appearing to read 'R. Stephenson', is centered on the page.

WEX GSA PM recap major topic outline

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An * after an item below indicates to consider a handout... 1

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 The macro boundaries of the GSA PBS mission. 1

 The organizational location of the project manager's work. 1

 What the student was supposed to learn in the seminars 1

 What we did in the regional seminars. 1

 What our work with the regions showed us. 1

 How the GSA project manager adds value to the project 1

 Project relations of GSA PBS with external agencies with whom... 1

 How can GSA PBS optimize the use of the project manager... . . . 1

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 This is a preliminary definition - might wish to refine in recap... 1

The macro boundaries of the GSA PBS mission* 1

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 Major needs of candidates for project management positions . . 7

How the GSA project manager adds value to the project* . . 7

 Perceptions of value added by students. 7

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 Actual value added 8

Project relations of GSA PBS with external agencies with... 8

WEX GSA PM recap major topic outline

These might include - (add more?) 8

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WEX GSA PM recap major topic outline

Major topic outline - revised 1/21/91

9:28:31 AM - Monday, January 21, 1991

Prepared from original topic outline dated 1/11/91 and from Phil Bennett's notes of January 18, 1991.

An * after an item below indicates to consider a handout or transparency

Introduction - considerations around which this discussing session is built

The mission of GSA

The macro boundaries of the GSA PBS mission

The organizational location of the project manager's work

What the student was supposed to learn in the seminars

What we did in the regional seminars

What our work with the regions showed us

How the GSA project manager adds value to the project

Project relations of GSA PBS with external agencies with whom they must interact

How can GSA PBS optimize the use of the project manager training?

Recommendations

The mission of GSA* - as visualized and formulated by rjs and pbe

To successfully accomplish major facility acquisition, upgrading and management as required to meet the needs of client government agencies.

This is a preliminary definition - might wish to refine in recap sessions

The macro boundaries of the GSA PBS mission*

Matrix components

X axis - Line of action - from GSA design & construction - project delivery process

X1 Determine need - Community plan and building evaluation

X2 Prepare program of requirements - Prospectus development study

X3 Validate and approve scope & cost - Approval & funding

X4 Acquire site - Pre design activity

WEX GSA PM recap major topic outline

- x5 Design project - Obtain client/tenant & regulatory input & prepare final construction documents
- x6 Implement pre construction activities - Swing space - relocations, construction contracts, phasing, mobilization
- x7 Develop site - Base construction
- x8 Build out for tenants - Tenant requirements, partitions, interiors & secondary distribution systems

y axis - Functional operating divisions

- y1 Planning
- y2 Management support staff
- y3 Contracts division
- y4 Real property management and safety division
- y5 Real estate division
- y6 Design & construction division

z axis - Functional operations - items of possible project work

* An asterisk in front of a subject indicates the subject is generic and includes generally the items listed below it.

z1 *Planning

- Commuter studies
- Economic studies and analyses
- Estimating
- Facility master planning
- Feasibility studies
- Historic preservation
- Land planning
 - Community
 - Historic
 - Urban
 - Rural
 - Site
- Market analysis
- Model making
- Political liaison
- Programming
- Social planning
- Traffic analyses

WEX GSA PM recap major topic outline

- Zoning changes
- Proforma analyses

22*Real estate

- Control
 - Purchase
 - Option
 - Right of first refusal
 - Exchange

- Site surveys
- Appraisals
- Zoning changes
- Political liaison
- Leasing
- Proforma analyses

23*Architecture

- Budgeting
- Material research
- Action planning and scheduling
- Architectural design
- Architectural production
- Building surveys
- Estimating
- Feasibility analyses
- Food service design
- Proforma analyses
- Graphics
- Historic preservation
- Inspection
- ~~Inspections~~
- Interior design
- Special technical disciplines
- Landscaping
- Model making
- Production
- Programming
- Quality assurance

WEX GSA PM recap major topic outline

- Specifications
- 24 *Engineering
 - Budgeting
 - Proforma analyses
 - Material research
 - Abatement
 - Action planning and scheduling
 - Acoustical
 - Building surveys
 - Civil
 - Construction document quality assurance
 - Electrical
 - Energy conservation
 - Environmental assessments
 - Environmental impact analyses
 - Estimating
 - Feasibility studies
 - Special technical disciplines
 - Geotechnical
 - Inspections
 - Material handling
 - Inspections
 - Life safety systems
 - Mechanical
 - Programming
 - Site utilities
 - Specifications
 - Structural
 - Telecommunications
 - Traffic analyses
- 25 *Contracts
 - Contract administration
 - ~~Maintain~~ Contract data *maintenance*
 - Procurement
 - Professional services
 - Construction services

WEX GSA PM recap major topic outline

- Building services
- Equipment
- Materials
- Supplies
- Building services
- Security
- Concessions

- Purchasing
- Specifications

26 *Construction

- New buildings
- Site improvements
- Building repairs
- Building alterations
- Construction administration
- Construction planning and scheduling

27 *Property management

- Leasing
- Maintenance
- Safety
- Security
- Space inventories
- Space utilization

28 *Support services

- Accounting
- Data processing
- Education and training
- Facility inventories
- Filing
- Graphics, reports and presentation preparation
- Information systems operations
- Legal
- Office management
- Personnel
- Stenographic

29 *Executive staff operations

WEX GSA PM recap major topic outline

Funding
Interagency liaison
Organizational planning
Political liaison
Project management
Marketing
Sales

Other possible components

Operating ability of the individual

Levels from A to ?

Should these correspond with the g ratings?

How should the operational level of an individual be defined?

What is the functional relation to operating levels?

Various projects being worked upon

The organizational location of the project manager's work?

The three dimensions of the project manager's court of action

The line of action followed by the project through the operating divisions

The level of operating ability of the individual

The nine major steps to effective project management

How the project manager interacts in the three dimensions

With functional groups

Internal

External

With project groups

Internal

External

What the student was supposed to learn in the seminars*

The purpose of the project management seminar was specifically **to teach present and prospective project managers within GSA PBS the principles and practice of effective project management.** Areas of practice addressed included:

- Roles and responsibilities of the project manager
- Systematic and effective project planning

WEX GSA PM recap major topic outline

- Effective management principles for the project staff
- Scheduling and budgeting from the project plan
- Monitoring and controlling project costs
- Project documentation and record keeping
- Project related communication and decision making
- Measuring project performance
- Use of automation in project management

What we did in the regional seminars

Imparted the necessary elements of effective project management
Drilled GSA students in the skills and techniques used in project management

Identified specific project related critical issues of importance

What our work with the regions showed us

Participant feedback

Recurring participant concerns

Projections of GSA's future as perceived by the participants

Major needs of candidates for project management positions

How the GSA project manager adds value to the project*

Perceptions of value added by students

From Atlanta, Kansas City and the National Capitol Regions

Total from three regions = 155 mentions

Management skill value = 60 mentions

Examples of the values mentioned

Ability to coordinate actions

Project management skills

Knowledge of the project management process

Making timely decisions

Monitoring the project

Starting projects on time

Ability to foresee problems

Ability to lead and manage

Ability to solve problems

Addition of continuity to project

Provision of attention to detail

Keeping project within budget

Keeping project on schedule

WEX GSA PM recap major topic outline

Technical knowledge value = 53 mentions

Examples of the values mentioned

Design review

Design and construction experience

Design and construction procedures

Knowing the project development process

Knowledge of problems and failures

As a technical consultant during construction

Expertise in construction contract management

Abilities to focus on the design process

Skills in client relations and reviewing contract documents

GSA system & process know how value = 20 mentions

Examples of the values mentioned

Knowledge of the government process

Knowledge of the procurement process

Knowledge of agencies involved

People and communications value = 19 mentions

Examples of the values mentioned

Experience in working with people

Ability to identify customer needs

Ability to develop clear channels of communications

Ability to translate information

Eagerness to learn value - 3 mentions

GSA management desired value added

To be developed as appropriate in recap session

Actual value added

To be discussed in recap session

Project relations of GSA PBS with external agencies with whom they must interact

Is this an appropriate subject to address in the briefing and recap?

These might include - (add more?)

Governmental clients or customers

Private professional service organizations

WEX GSA PM recap major topic outline

Private construction contract organizations
Governmental agencies at regional, state and local levels
Functional governmental agencies adding value to GSA PBS projects
Private clients or customers?

How can GSA optimize the use of the project manager training

1. The overview
 - a. Discover the boundaries of talents available
 - a. Internal
 - b. External
 - b. Discover the boundaries of client project needs
 - c. Discover the boundaries of GSA needs
 - d. Discover the GSA boundaries that align with client expectations
 - e. Match the talent available, client needs & GSA needs with the expectations
2. The details

Recommendations

Response to identified concerns of GSA
Actions to improve and strengthen the GSA project management system
Building effective linkages at the national and regional levels
Other

Supplementary material

Questions & requests

To Phil Bennett

- Should attendees be asked to bring a class notebook?
- Please further define the mission of GSA PBS
- Should we discuss what we did not cover in the seminars?
 - What we did not encompass in the seminars
 - Specific project organizational structures for GSA PBS
 - Detailed administrative procedures for the GSA PBS

Handouts to be used

WEX GSA PM recap major topic outline

Transparencies to be used

Program evaluation sheet

GSA matrix of project management operations

Recap of value added

Suggested mission of GSA PBS

Those things the student was supposed to learn in the seminars

Terms that might be defined

Agency construction management

The cm is an agent of the owner. The cm acts as a consultant and expert but generally does not make cost or schedule guarantees. Contracts for the construction work are between the construction contractors and the owner.

Contractor construction management

The cm acts as an expert and consultant but also contracts directly with the subcontractors to do the construction work and may make cost or schedule guarantees. Contractor cm usually includes the cm taking the role of the general contractor during the construction portion of the project.

Interesting facts

GSA staff

GSA's total design and construction staff decreased from about 940 in 1981 to 691 as of June 30, 1989 (from GAO report, page 16).

Management and inspection services - M & I

The construction manager's role is now generally limited to what the GSA calls management and inspection services (from GAO report, page 17)

Notes from reference material

GSA Order PBS 3425.12A - 8/21/90 - PM in the PBS - abstracted 1/14/91

GSA orders preceding this order include:

- GSA order PBS 3425.12 dated 6/22/88
- Instructional letter PBS IL - 89 - 8 dated 9/18/89
- The above cancelled by PBS 3425.12A dated 4/6/90
- PBS 3425.12A cancelled by PBS 3425.12A dated 8/21/90

WEX GSA PM recap major topic outline

Signed by William C. Coleman - Commissioner, Public Building Services

How need for pm arose

The PBS management structure does not otherwise provide a single point of accountability for life-cycle management of major facility acquisitions and upgrades.

Facility acquisition - new construction, building purchase, lease-purchase

Facility upgrade - line item repair, alterations

PM is in position of overall accountability without having line authority over all project related operations

GSA regions expected to employ cm firms to help in daily admin, technical & qc activities

Major facility acquisition and upgrade will be handled thru a matrix pm system

Will be under the leadership of an assigned GSA pm

General threshold for pm is above \$10 million subject to case by case evaluation

Steps in project life cycle

Identification of need to Central Office authorization

Called the project development stage

GSA pm starts when project is authorized by Central Office

Approval to proceed - direct funded & lease-purchase projects

Notification of apportionment of funds for building purchase

Project development and project management are mutually dependent

PM's orientation will shift from functional operations to longer term, management perspectives

PM's overall function

To plan, coordinate, and control all primary and supporting activities upon which the successful completion of the project is dependent.

WEX GSA PM recap major topic outline

The pm's role ends after the achievement of a fully occupied and operating facility

The pm is to plan, coordinate and control all project efforts

The project manager is to lead the project team

Interesting statement re functional organizations in GSA

PBS functional organizations shall retain and exercise their normal responsibilities for interacting and coordinating with outside interests.

The meaning of this relative to the pm authority & responsibility should be made clear

The project manager is to be assigned by the Assistant Regional Administrator

Assigned for the full project life cycle

Report to either

Head of the division-level PBS organization having primary responsibility for the project

Directly to the ARA for PBS

PM's can be appointed by the ARA prior to project authorization

PM's to be appointed no later than Central Office project authorization

Project management is the sole or primary responsibility of the pm

Collateral duties must be subordinate to & not interfere with the pm's performance as a pm

Each project will have a project management plan

Note: The project plan is mentioned frequently in many parts of this document

Purposes of plan

define all parameters of scope, time, cost

delineate strategies for implementation

establish roles & responsibilities of all parties involved

PM's will prepare and submit plans upon receipt of Central Office authorization

Plans will be submitted within 90 calendar days to the Assistant Commissioner for Real Property

WEX GSA PM recap major topic outline

Signatures required for concurrence from all appropriate officials

Minimum material to be included in project plan

- Goals

- Objectives

- Scope of work

- Implementation strategies

 - Project delivery systems

 - Project phasing

 - Tenant relocations

 - Procurement approaches

 - Quality assurance techniques

 - Client participation

 - Input from advisory & regulatory bodies

 - Contract clearances

 - Needed warrants & other delegations of authority

- Network model of the plan implementation if warranted

- Schedule as derived from the network plan - milestones shown

 - A/E or design build solicitation

 - Design start

 - Concept approval

 - Design completion (each phase)

 - Construction start (each phase)

 - Construction complete (each phase)

- Budget

- Organization

- Concurrences & approvals - sign offs

PM's are responsible for publishing project status reports

Project status reports should contain

- Narrative section

 - Upcoming events of general interest to management

 - Current issues & problems

 - Remedial actions underway to address problems

- Schedule data in tabular form

 - Milestones identified in project management plan

WEX GSA PM recap major topic outline

Schedule reflected in original management plan

Current schedule

Revised schedule dates as currently estimated

Budget data

Status of each activity shown in management plan against

Total funds available

Obligations to date

Current fund balance

Estimated future requirements

Projected funds balance

Major topic outline - prepared 1/11/91

Note: This material has been incorporated into the final outline material

12:49:34 PM - Friday, January 11, 1991

Introduction - the considerations around which the recap session are built

How the GSA project manager adds value the project

The macro boundaries of the various levels of the GSA project manager

Operational ability of the project manager

Major line of action within which the project manager works

Project steps for which the project manager is responsible

Relations of GSA with the external agencies with whom they must work to accomplish the GSA mission

What the student was supposed to learn in the seminars

What we did in the regional seminars

Imparted the necessary elements of effective project management

Drilled GSA students in the skills and techniques used in project management

Identified specific project related critical issues of importance

What our work with the regions showed us

Participant feedback

Recurring participant concerns

Projections of GSA's future as perceived by the participants

WEX GSA PM recap major topic outline

- Major needs of candidates for project management positions
- The organizational location of the project manager's work?
 - The three dimensions of the project manager's court of action
 - The line of action followed by the project through the operating divisions
 - The level of operating ability of the individual
 - The nine major steps to effective project management
 - How the project manager interacts in the three dimensions
 - With functional groups
 - Internal
 - External
 - With project groups
 - Internal
 - External
- How does GSA optimize the use of the project manager training
 - 1. The overview
 - a. Discover the boundaries of talents available
 - a. Internal
 - b. External
 - b. Discover the boundaries of client project needs
 - c. Discover the boundaries of GSA needs
 - d. Discover the GSA boundaries that align with client expectations
 - e. Match the talent available, client needs & GSA needs with the expectations
 - 2. The details
- Recommendations
 - Response to identified concerns of GSA
 - Actions to improve and strengthen the GSA project management system
 - Building effective linkages at the national and regional levels
 - Other

GSA PBS Project Manager Seminar Debriefing - discussion outline

I. Introduction - considerations around which this discussion session is built - San Antonio, Texas - February 11, 1991

- A. The mission of GSA PBS**
- B. The macro boundaries of the GSA PBS mission**
- C. The organizational location of the project manager's work**
- D. What the student was supposed to learn in the seminars**
- E. What we did in the regional seminars**
- F. What our work with the regions showed us**
- G. How the GSA PBS project manager adds value to the project**
- H. Project relations of GSA PBS with external agencies with whom they must interact**
- I. How GSA PBS can optimize the use of the project manager training?**
- J. Recommendations**

II. The mission of GSA PBS- as assumed for a baseline discussion

To successfully accomplish major facility acquisition, upgrading and management as required to meet the needs of client government agencies.

III. The macro boundaries of the GSA PBS mission

The matrix components below appear to contain most of the major individual action courts (one unit of volume) in which the work of the GSA PBS must be played.

A. GSA PBS macro matrix components

- 1. X axis - Line of action
 - X1 Determine need - Community plan and building evaluation
 - X2 Prepare program of requirements - Prospectus development study
 - X3 Validate and approve scope & cost - Approval & funding
 - X4 Acquire site - Pre design activity
 - X5 Design project - Obtain client/tenant & regulatory input & prepare final construction documents
 - X6 Execute pre construction activities - Swing space occupancy, relocation, construction contracts, phasing, mobilization
 - X7 Develop site - Base construction
 - X8 Build out for tenants - Tenant requirements, partitions, interiors & secondary distribution systems
- 2. Y axis - Functional operating divisions
 - Y1 Planning
 - Y2 Management support staff
 - Y3 Contracts division
 - Y4 Real property management and safety
 - Y5 Real estate

GSA PBS Project Manager Seminar Debriefing - discussion outline

- Y6 Design & construction
- 3. Z axis - Functional operations - items of project work (see Appendix A for details)
 - Z1 Planning
 - Z2 Real estate
 - Z3 Architecture
 - Z4 Engineering
 - Z5 Contracts
 - Z6 Construction
 - Z7 Property management
 - Z8 Support services
 - Z9 Executive staff operations

IV. The organizational location of the project manager's work

A. Project manager macro matrix components

1. X axis - Line of action
 - X4 Acquire site - Pre design activity
 - X5 Design project - Obtain client/tenant & regulatory input & prepare final construction documents
 - X6 Execute pre construction activities - Swing space occupancy, relocation, construction contracts, phasing, mobilization
 - X7 Develop site - Base construction
 - X8 Build out for tenants - Tenant requirements, partitions, interiors & secondary distribution systems
2. Y axis - Functional operating divisions
 - Y1 Planning
 - Y2 Management support staff
 - Y3 Contracts division
 - Y4 Real property management and safety
 - Y5 Real estate
 - Y6 Design & construction
3. Z axis - Functional operations - items of project work
 - Z1 Planning
 - Z2 Real estate
 - Z3 Architecture
 - Z4 Engineering
 - Z5 Contracts
 - Z6 Construction
 - Z8 Support services - minor administrative actions only

B. Items that define a pm's work within the small courts of action

1. Operating division within which the pm is working
2. Line of action followed by the operating division
 - The processes each division in each region uses to do their work.

GSA PBS Project Manager Seminar Debriefing - discussion outline

3. Functional operations being carried out
May be, in part, a function of the service grade and specialty of the pm
4. The nine major steps to effective project management
 - Step #1 Set goals and objectives
 - Step #2 Select project delivery system
 - Step #3 Prepare an action plan for what has to be done
 - Step #4 Translate the action plan into schedules
 - Step #5 Build the project organization
 - Step #6 Set an MX management system
 - Step #7 Get to work
 - Step #8 Measure progress and performance
 - Step #9 Close out the work

C. How the project manager interacts in the three dimensions X, Y & Z

1. With functional groups - debriefing discussion*
 - Internal
 - External
2. With project groups - debriefing discussion*
 - Internal
 - External

V. The seminar mission

To teach the principles and practice of effective project management to GSA PBS staff, whomever is in the class, and to teach these to the absolute limit of our abilities.

VI. What the seminar student was supposed to learn - listed at random

- A. Communicating and decision making**
- B. Measuring project performance**
- C. Monitoring and controlling project costs**
- D. Principles of effective leadership**
- E. Principles of managing effectively**
- F. Project documentation and record keeping**
- G. Roles and responsibilities of the project manager**
- H. Scheduling and budgeting from the project plan**
- I. Systematic and effective project planning**
- J. Using automation in project management**

VII. What we did in the regional seminars

A. Seminars presented

1. Special series
 - Chicago, Illinois
 - Washington D. C. - management preview seminar
2. Regular series
 - 03/19/90 to 03/23/90 Philadelphia, Pennsylvania
 - 04/02/90 to 04/06/90 San Francisco, California

GSA PBS Project Manager Seminar Debriefing - discussion outline

04/23/90 to 04/27/90	New York, New York
05/14/90 to 05/18/90	Chicago, Illinois
06/18/90 to 06/22/90	Fort Worth, Texas
07/09/90 to 07/13/90	Atlanta, Georgia
07/16/90 to 07/20/90	Kansas City, Missouri
09/10/90 to 09/14/90	Washington D. C.

B. General statistics for regular series

1. Total class contact hours = 280
2. Participants receiving certificates = 286
3. Average class evaluation rating = 4.5 on a scale of 1 to 5

C. Actions taken with class

1. Imparted elements of effective pm
 - By lecture
 - By workshop
 - By table work
 - By case studies
 - By symposium
2. Drilled students in practice of pm skills and techniques
3. Quizzed students - Presented 120 to 130 closed questions per seminar
4. Explained the use of about 45 specific project techniques

D. Seminar major content summary

1. Cost management and control
2. Effective resource use
3. Introduction to project management principles
4. Managing people
5. Managing projects
6. Organizational interactions
7. Personal analysis for the project manager
8. Personal skills improvement for the project manager
9. Planning the project
10. Principles of good training
11. Project communications
12. Project management in GSA PBS
13. Project monitoring, measuring & controlling
14. Setting project goals and objectives
15. The project organization
16. Time management & control
17. Translating the project plan
18. Use of systems in project management

VIII. What our work with the regions showed us

A. Participant feedback

The rating sheets and the numeric scores indicated that the material was well received by the participants. It further confirmed that the subjects presented provided extended

GSA PBS Project Manager Seminar Debriefing - discussion outline

insights into today's design and construction profession.

B. Topics of special interest - observed in and out of classroom

1. Balancing time spent on functional and project duties
2. Contract document quality assurance
3. Decision making
4. Design/build delivery systems
5. Distinction between project and functional management
6. Ethical behavior in the planning, design and construction profession
7. Exertion of leverage on projects
8. Extended concepts of project delivery systems
9. Funds committed vs money spent relationships
10. How to operate at high professional levels
11. Network modeling basics
12. Personal computer software
13. Personal computing as a project management tool
14. Personal evaluation techniques
15. Personal to do lists
16. Processing of proposals through contracts division
17. Programming and validation of projects
18. Project and functional operating linkages
19. Project deficiency records
20. Qualities of a good project manager
21. Real estate considerations in project management
22. Risk assignment
23. Setting selection standards
24. Sources of project manager talent
25. Standard project terminology
26. Systems concepts for the project manager
27. Technography
28. The need to add value to the project
29. Use of quizzes to improve the knowledge retained level
30. Use of the single number filing system

C. Items of special concern - as observed from participants

1. Blurred organizational relationships
2. Class disruptions during learning process
3. Conflict in policy from region to region
4. Confusion as to what types of project delivery systems are allowable
5. Difficulties in maintaining project continuity
6. Imbalance in authority vested and responsibility assigned
7. Lack of adequate project manager guidelines
8. Lack of administrative support services
9. Lack of continuity at appointee levels in GSA PBS
10. Lack of cross training

GSA PBS Project Manager Seminar Debriefing - discussion outline

11. Lack of pm clout in dealing with professional service and construction contractors
12. Lack of project manager clout within regional divisions
13. Lack of project manager role definition
14. Lack of storage and retrieval systems for historical data
15. Lack of visible upper management seminar participation (some regions only)
16. Large numbers of projects assigned to a single project manager
17. Length of contracts processing time
18. Need for better method of storing and retrieving construction record sets
19. Overtraining for positions that may not be available in GSA PBS
20. Policy & procedural differences between operating divisions
21. Poor professional service contractor performance
22. Properly crossing critical transition lines and zones
23. Redundantly layered external operations
24. Restrictions on types of project delivery systems that are permissible
25. Skepticism that a macro project management system will work given the present GSA PBS structure
26. Source of cadre for the project manager staff
27. The CQM role in projects
28. The future for the functional expert within GSA PBS
29. The temporary nature of project organization

D. Projections of GSA's future as perceived by seminar participants

1. To be discussed in debriefing session*

E. Desirable characteristics of candidates for project manager positions

These are what we observed as characteristics needed to properly manage projects of the type upon which most of the seminar attendees were engaged.

1. Accurately comprehend scope of project
2. Can be creative
3. Can take authority and then earn it
4. Communicate effectively
5. Desire & achieve excellence
6. Ethical
7. Express ideas well
8. Follow an effective mode of action
9. Have endurance
10. Have good education
11. Have good sense of humor
12. Have integrity
13. Have potential for improvement
14. Have technical and professional credentials

GSA PBS Project Manager Seminar Debriefing - discussion outline

15. Honest
16. Identify trends accurately
17. Innovative
18. Intelligent
19. Intelligently consistent
20. Intelligently inquisitive
21. Know how to collect essential information
22. Lead well
23. Listen & learn
24. Make good decisions
25. Make timely decisions
26. Manage conflict well
27. Manage people well
28. Motivate others
29. Move from micro to macro and back again at will
30. Open and close systems well
31. Organize and link activities
32. Patient
33. Perceive problems
34. Plan ahead
35. Resolve problems effectively
36. Respond to legitimate demands
37. Trained well
38. Understand cause/effect relations
39. Understand the role of profit in our society
40. Unite people groups
41. Use hindsight to look at the future
42. Utilize resources effectively
43. Work well with people

IX. How the GSA project manager adds value to the project

A. Student perceptions of value they add to a project

Derived from surveys of the Atlanta, Kansas City & Washington D.C. project management classes.

1. Total responses from three regions = **155** mentions
Management skill = **60** mentions

Examples of frequently mentioned values added

- Ability to coordinate actions
- Ability to foresee problems
- Ability to lead and manage
- Ability to solve problems
- Addition of continuity to project
- Keeping project on schedule
- Keeping project within budget
- Knowledge of the project management process
- Making timely decisions

GSA PBS Project Manager Seminar Debriefing - discussion outline

- Monitoring the project
- Project management skills
- Provision of attention to detail
- Starting projects on time

Technical knowledge = **53** mentions

Examples of frequently mentioned values added

- Abilities to focus on the design process
- As a technical consultant during construction
- Design and construction experience
- Design and construction procedures knowledge
- Design review ability
- Expertise in construction contract management
- Knowing the project development process
- Knowledge of problems and failures
- Skills in client relations and reviewing contract documents

GSA system & process know how = **20** mentions

Examples of frequently mentioned values added

- Knowledge of government process
- Knowledge of procurement process
- Knowledge of agencies involved

People and communications = **19** mentions

Examples of frequently mentioned values added

- Experience in working with people
- Ability to identify customer needs
- Ability to develop clear channels of communications
- Ability to translate information

Eagerness to learn - **3** mentions

B. GSA management desired value added

Pivotal question - What value does the GSA PBS management wish, or want, or demand, or expect, the project manager to add to the project?

1. To be discussed in debriefing session*

C. Actual value added

1. To be discussed in debriefing session*

How do we measure value added

Might start with the 37 elements of importance as a standard of performance

See rjs ho #341 - GSA PM book ho #1.34, 1.35, 1.36 & 1.37

X. Project relations of GSA PBS with external agencies with whom they must interact

A. To be discussed in debriefing session*

B. Might include

GSA PBS Project Manager Seminar Debriefing - discussion outline

1. Facility occupants
2. Functional governmental agencies adding value to GSA PBS projects
3. Governmental agencies at regional, state and local levels
4. Governmental clients or customers
5. Private clients or customers
6. Private construction contract organizations
7. Private professional service organizations

XI. How GSA can optimize the use of project manager training

A. The overview

1. Discover boundaries of talent available
 - a. Internal
 - b. External
2. Discover boundaries of client needs
3. Discover boundaries of GSA PBS needs
4. Discover GSA PBS boundaries that align with client expectations
5. Match talents available, client needs & GSA PBS needs with the expectations

B. The details - to be addressed in debriefing sessions*

XII. Recommendations

A. Refine and expand the Project Management Guide

B. Prepare a Project Management Manual of Practice

C. Develop regional project management training sessions

1. To train present project managers
2. To train prospective project managers
3. To orient those who must work within the project management system

D. Build an automated regional GSA PBS project information network

E. Build an automated national GSA PBS project information network

F. Build regional and national project information data bases for improved decision making

G. Develop and implement a quality assurance plan

1. To monitor design
2. To monitor construction

H. Set system of measuring value added by effective project management

I. Improve management balancing of responsibility and authority

1. Formally
2. Informally

J. Improve effectiveness of relations between project managers and contract officers

K. Improve GSA user need identification and programming

L. Improve linkages between project management and field operations during construction

GSA PBS Project Manager Seminar Debriefing - discussion outline

- M. Develop GSA PBS project manager position description and performance model***
- N. Establish project delivery management models for various kinds of projects***

Handout list for GSA PBS debriefing session
February 11, 1991 - San Antonio, Texas

• **Debriefing discussion outline and introduction** - 10 pages

• **Discussion material** - 28 pages

- 01 Considerations around which debriefing is built
- 02 The mission of GSA PBS
- 03 GSA PBS matrix - X axis - line of action
- 04 GSA PBS matrix - Y axis - functional operating divisions
- 05 GSA PBS matrix - Z axis - functional operations
- 06 GSA PBS matrix of project management operations
- 07 GSA PBS matrix of project manager boundaries
- 08 GSA PBS matrix - costs committed/money spent
- 09 Costs committed/money spent explanation
- 10 Items that define the pm's individual work within a court
- 11 GSA PBS matrix - court definition
- 12 Matrix court of action
- 13 The seminar mission
- 14 What the seminar student was supposed to learn
- 15 Seminars presented
- 16 Seminar statistics and actions
- 17 Seminar major content
- 18 - 21 What our work with the regions showed us
- 22 - 23 Desirable characteristics of candidates for project manager
- 24 - 25 Student perceptions of value added
- 26 Improvement cycle
- 27 How GSA PBS can optimize the use of pm training
- 28 Recommendations

• **Appendix A - Description of GSA PBS pm matrix** - 4 pages

Considerations Around Which This Debriefing Session is Built

- A. The mission of GSA PBS.**
- B. The macro boundaries of the GSA PBS mission.**
- C. The organizational location of the project manager's work.**
- D. What the student was supposed to learn in the seminar.**
- E. What we did in the regional seminars.**
- F. What our work with the regions showed us.**
- G. How the GSA PBS project manager adds value to the project.**
- H. Project relations of GSA PBS with external agencies with whom they must interact.**
- I. How GSA PBS can optimize the use of the project manager training.**
- J. Recommendations.**

The mission of GSA PBS

To successfully accomplish major facility acquisition, upgrading and management as required to meet the needs of client government agencies.

GSA PBS macro matrix components

X axis - Line of action

X 1 - Determine need - Community plan and building evaluation

X 2 - Prepare program of requirements - Prospectus development study

X 3 - Validate and approve scope & cost - Approval & funding

X 4 - Acquire site - Pre design activity

X 5 - Design project - Obtain client/tenant & regulatory input & prepare final construction documents

X 6 - Execute pre construction activities - Swing space occupancy, relocations, construction contracts, phasing, mobilization

X 7 - Develop site - Base construction

X 8 - Build out for tenants - Tenant requirements, partitions, interiors & secondary distribution systems

GSA PBS macro matrix components

Y axis - Functional Operating Divisions

Y 1 - Management support

Y 2 - Real properties and safety

Y 3 - Contracts

Y 4 - Design & construction

Y 5 - Real estate

Y 6 - Planning

GSA PBS macro matrix components

Z axis - Functional Operations

Z 1 - Planning

Z 2 - Real estate

Z 3 - Architecture

Z 4 - Engineering

Z 5 - Contracts

Z 6 - Construction

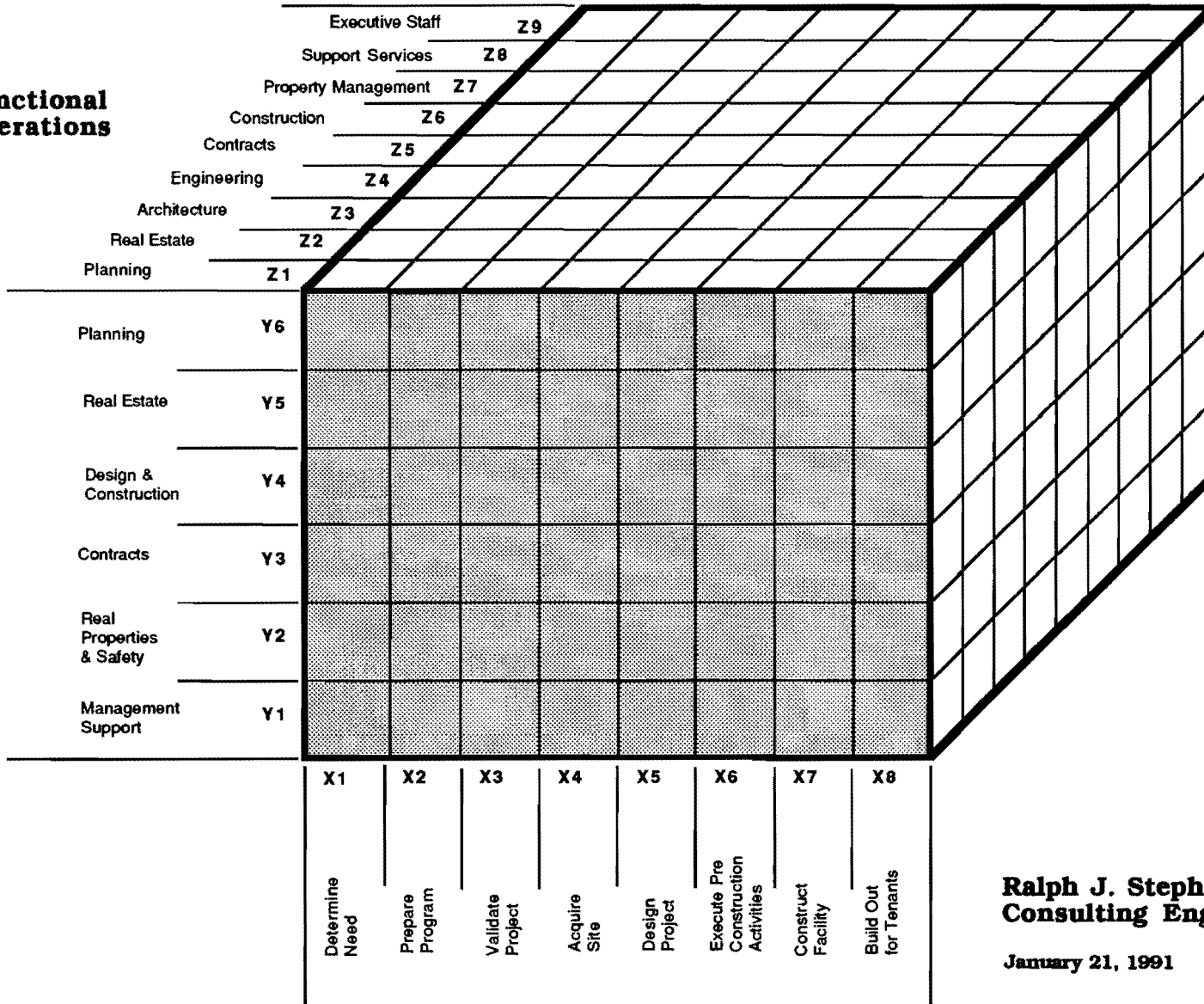
Z 7 - Property management

Z 8 - Support services

Z 9 - Executive staff operations

GSA Matrix of Project Management Operations

Functional Operations



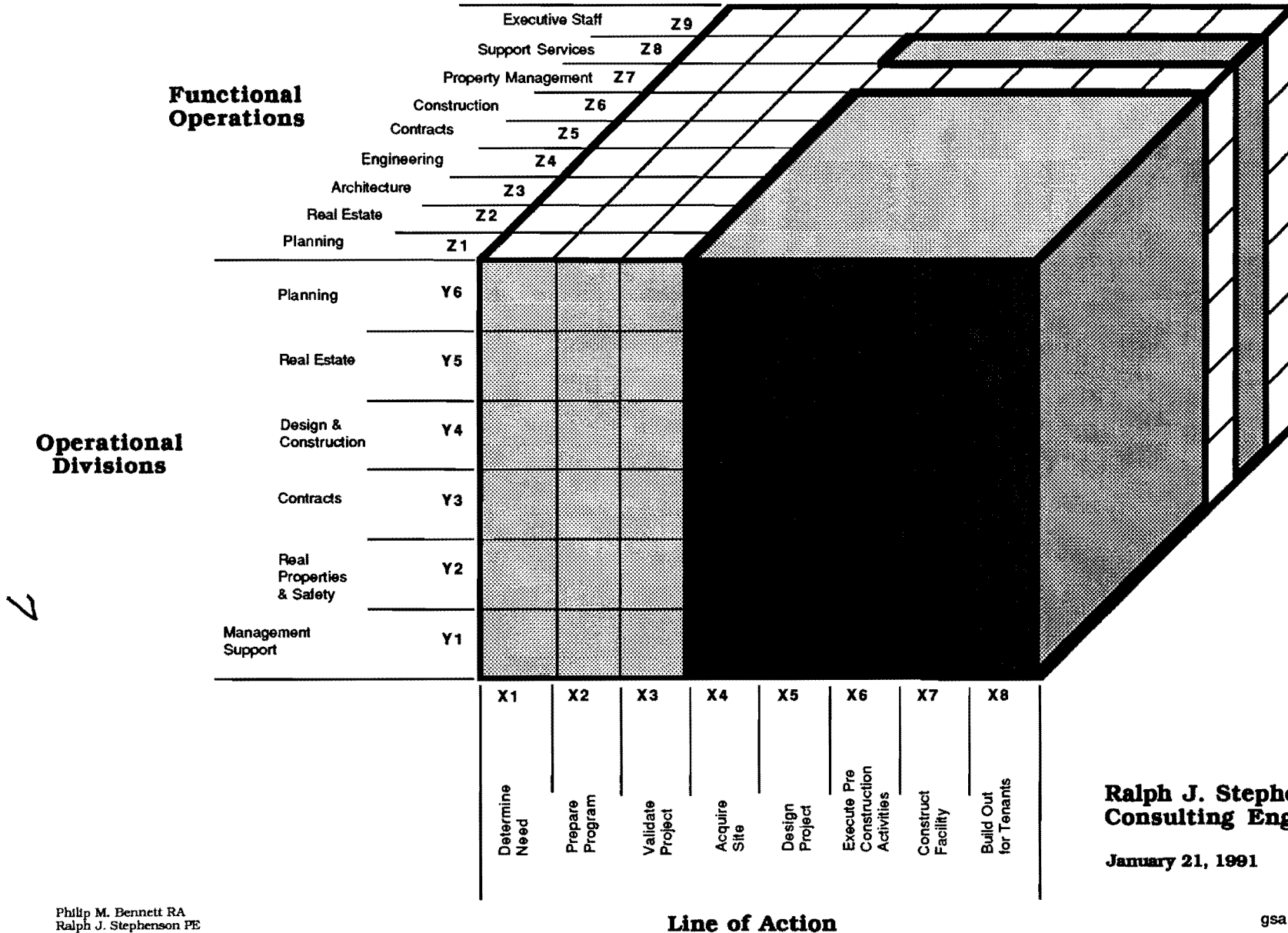
Line of Action

**Ralph J. Stephenson PE
Consulting Engineer**

January 21, 1991

GSA Matrix of Project Management Operations

Current macro boundaries of project manager's work

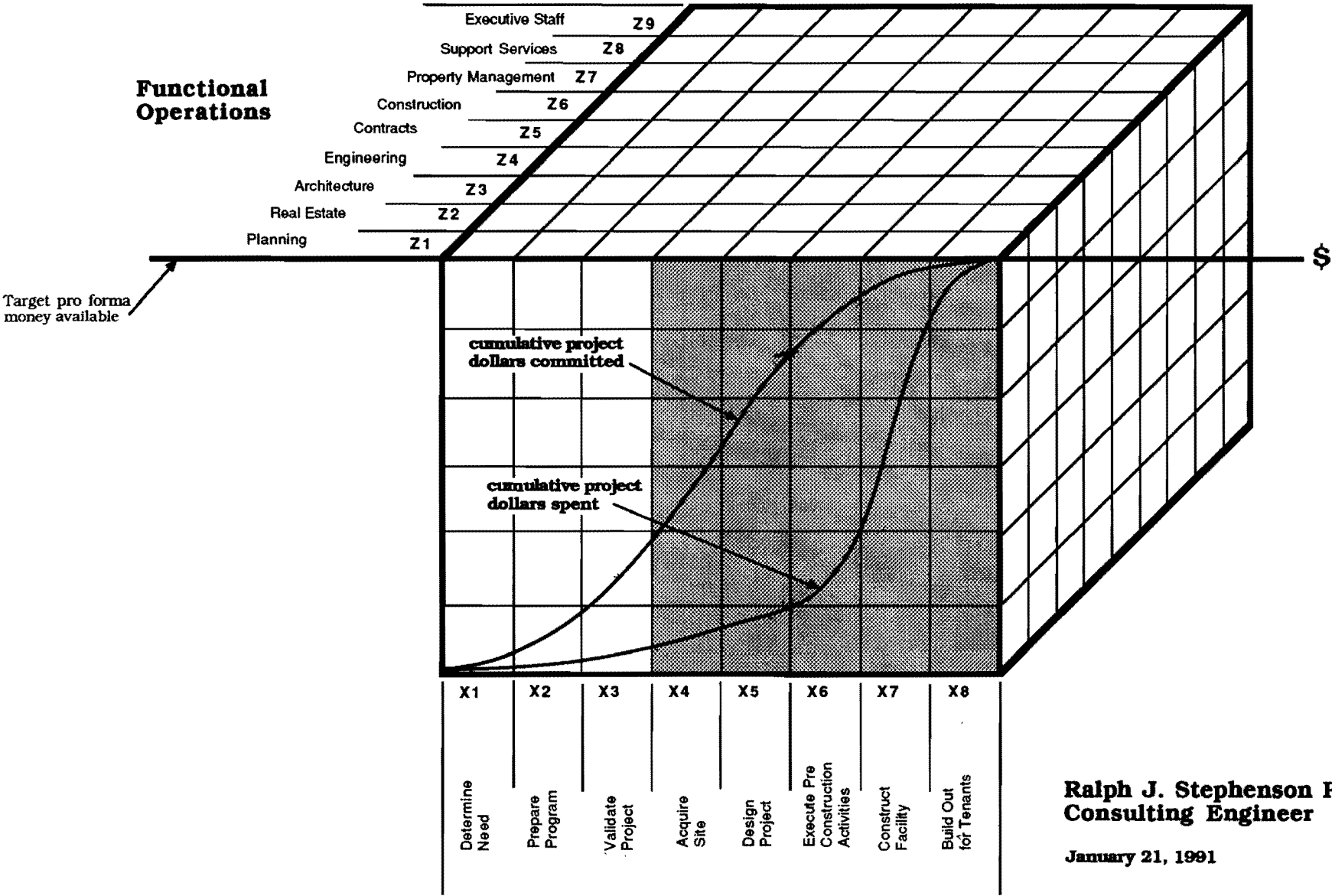


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Consulting Engineer

January 21, 1991

GSA Matrix of Project Management Operations

Costs Committed Compared to Money Spent



Ralph J. Stephenson PE
Consulting Engineer

January 21, 1991

Line of Action

Costs Committed / Money Spent

- **Committed costs are promised funds for purposes, that if such purposes are aborted a penalty must be paid.**

Types of penalties & losses may include:

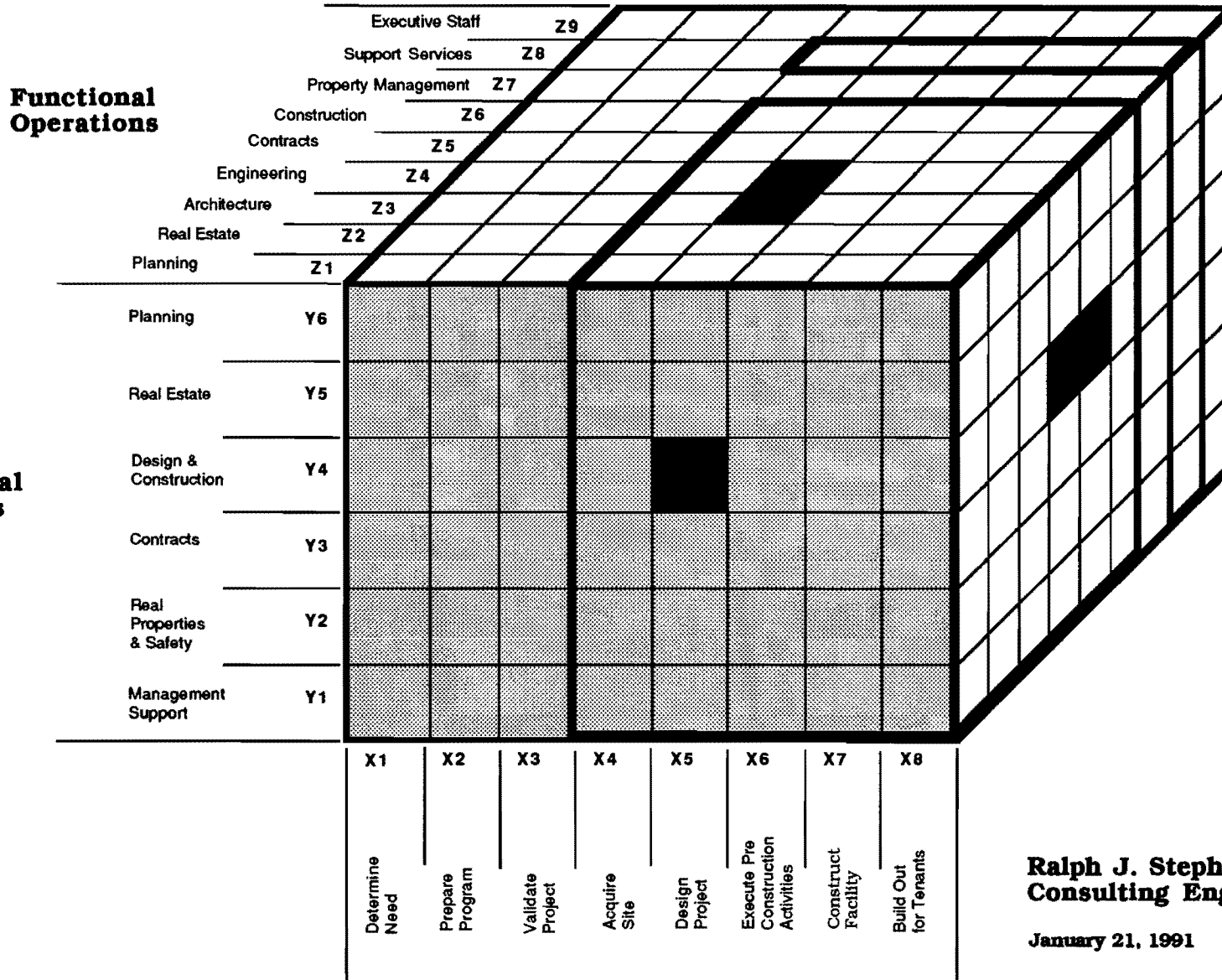
- **OPTION COSTS**
- **RIGHT OF FIRST REFUSAL COSTS**
- **LEGAL FEES**
- **EARLY ENGINEERING FEES**
- **EARLY PLANNING FEES**
- **DISPLEASURE OF CONGRESS**
- **STAFF TIME EXPENDITURES**
- **LOSS OF CREDIBILITY**
- **LOSS OF OPPORTUNITY**

Items that define the pm's individual work within a court of action

- **Operating division within which the pm is working**
- **Line of action followed by the operating division**
- **Functional operations being carried out**
- **The nine major steps to effective project management**
 - #1 - Set goals and objectives**
 - #2 - Select project delivery system**
 - #3 - Prepare an action plan for what has to be done**
 - #4 - Translate the action plan into schedules**
 - #5 - Build the project organization**
 - #6 - Set an MX management system**
 - #7 - Get to work**
 - #8 - Measure progress and performance**
 - #9 - Close out the work**

GSA Matrix of Project Management Operations

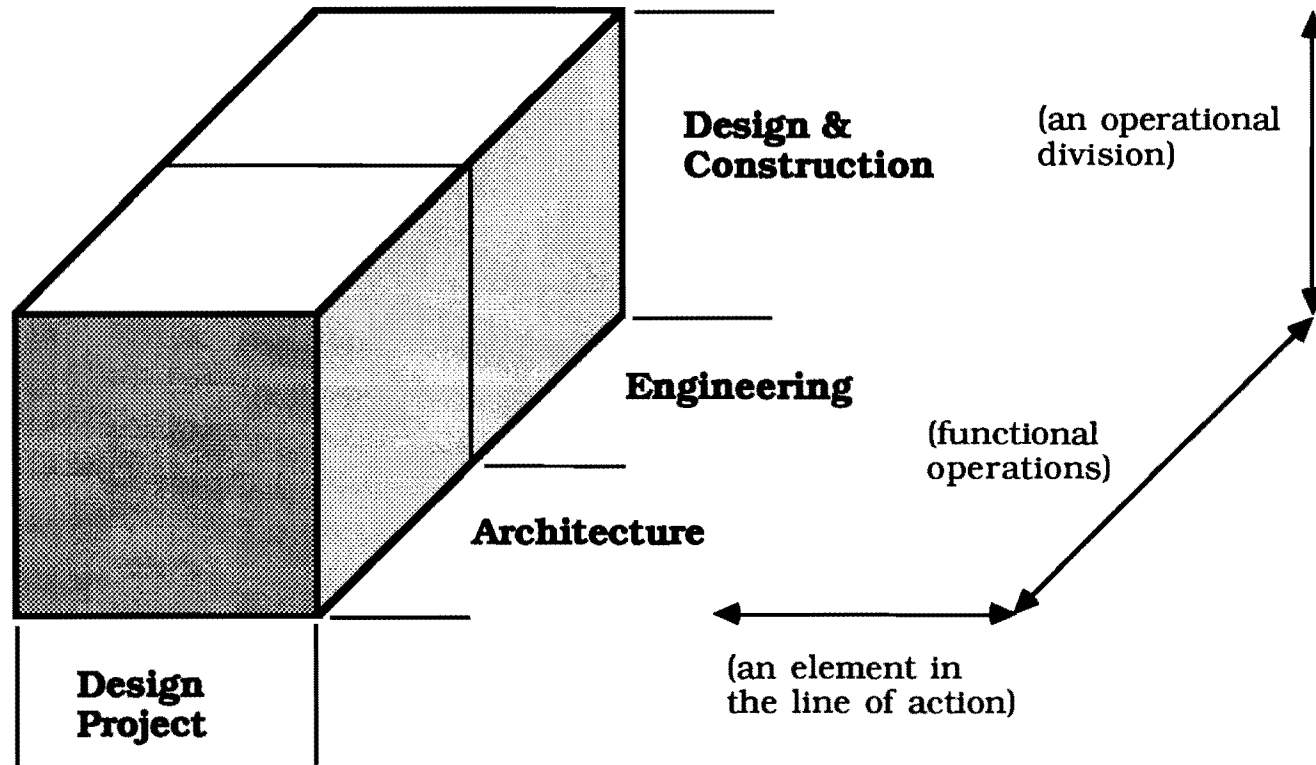
Current macro boundaries of project manager's work



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Consulting Engineer

January 21, 1991

12



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Consulting Engineer

January 21, 1991

Philip M. Bennett RA
Ralph J. Stephenson PE

Court of Action

gsa repm ho 08
rjs/pbe 02/11/91

The Seminar Mission

To teach the principles and practices of effective project management to GSA PBS staff, whomever is in the class, and to teach these subjects to the absolute limit of our abilities.

What the Seminar Student Was Supposed to Learn

- **Communicating and decision making**
- **Measuring project performance**
- **Monitoring and controlling project costs**
- **Principles of effective leadership**
- **Principles of managing effectively**
- **Project documentation and record keeping**
- **Roles and responsibilities of the project manager**
- **Scheduling and budgeting from the project plan**
- **Systematic and effective project planning**
- **Using automation in project management**

Seminars Presented

. Special series

Chicago, Illinois

Washington D. C. - management preview seminar

. Regular series

03/19/90 to 03/23/90 Philadelphia, Pennsylvania

04/02/90 to 04/06/90 San Francisco, California

04/23/90 to 04/27/90 New York, New York

05/14/90 to 05/18/90 Chicago, Illinois

06/18/90 to 06/22/90 Fort Worth, Texas

07/09/90 to 07/13/90 Atlanta, Georgia

07/16/90 to 07/20/90 Kansas City, Missouri

09/10/90 to 09/14/90 Washington D. C.

Project Management Seminar

Statistics & Actions

Total class contact hours = 280

Participants receiving certificates = 286

Average class rating = 4.5 on a scale of 1 to 5

Actions taken with class

- **Imparted elements of effective pm**
 - By lecture**
 - By workshop**
 - By table work**
 - By case studies**
 - By symposium**
- **Drilled students in pm skills & techniques**
- **Quizzed classes - Presented 120 to 130 closed questions per seminar**
- **Explained the use of about 45 specific project management techniques**

Seminar Major Content Summary

- **Cost management and control**
- **Effective resource use**
- **Introduction to project management principles**
- **Managing people**
- **Managing projects**
- **Organizational interactions**
- **Personal analysis for the project management**
- **Personal skills improvement for the pm**
- **Planning the project**
- **Principles of good training**
- **Project communications**
- **Project management in GSA PBS**
- **Project monitoring, measuring & controlling**
- **Setting project goals and objectives**
- **The project organization**
- **Time management and control**
- **Translating the project plan**
- **Use of systems in project management**

What Our Work With the Regions Showed Us

• *Participant feedback*

The rating sheets and the numeric scores indicated that the material was well received by the participants. It further confirmed that the subjects presented provided extended insights into today's design and construction profession.

• *Topics of special interest*

- **Balancing time spent on functional and project duties**
- **Contract document quality assurance**
- **Decision making**
- **Design/build delivery systems**
- **Distinction between project & functional management**
- **Ethical behavior in the planning, design and construction profession**
- **Exertion of leverage on projects**
- **Extended concepts of project delivery systems**
- **Funds committed vs money spent relationships**
- **How to operate at high professional levels**
- **Network modeling basics**
- **Personal computer software**

- **Personal computing as a project management tool**
- **Personal evaluation techniques**
- **Personal to do lists**
- **Processing of proposals through contracts division**
- **Project and functional linkages**
- **Programming and validation of projects**
- **Project deficiency records**
- **Qualities of a good project manager**
- **Real estate considerations in project management**
- **Risk assignment**
- **Setting selection standards**
- **Sources of project manager talent**
- **Standard project terminology**
- **Systems concepts for the project manager**
- **Technography**
- **The need to add value to the project**
- **Use of quizzes to improve the knowledge retained level**
- **Use of the single number filing system**

What Our Work With the Regions Showed Us

- ***Items of special concern***
 - **Blurred organizational relationships**
 - **Class disruptions during learning process**
 - **Conflict in policy from region to region**
 - **Confusion as to what types of project delivery systems are allowable**
 - **Difficulties in maintaining project continuity**
 - **Imbalance in authority vested and responsibility assigned**
 - **Lack of adequate project manager guidelines**
 - **Lack of administrative support services**
 - **Lack of continuity at appointee levels in GSA PBS**
 - **Lack of cross training**
 - **Lack of pm clout in dealing with professional service and construction contractors**
 - **Lack of pm clout within regional divisions**
 - **Lack of project manager role definition**
 - **Lack of storage and retrieval systems for historical data**
 - **Lack of visible upper management seminar participation (some regions only)**
 - **Large numbers of projects assigned to a single project**

manager

- **Length of contracts processing time**
- **Need for better method of storing and retrieving construction record sets**
- **Overtraining for positions that may not be available in GSA PBS**
- **Policy & procedural differences between operating divisions**
- **Poor professional service contractor performance**
- **Properly crossing critical transition lines & zones**
- **Redundantly layered external operations**
- **Restrictions on types of project delivery systems that are permissible**
- **Skepticism that a macro project management system will work given the present GSA PBS structure**
- **Source of cadre for the project manager staff**
- **The CQM role in projects**
- **The future for the functional expert within GSA PBS**
- **The temporary nature of project organization**

Desirable Characteristics of Candidates for Project Manager Positions

- **Accurately comprehend scope of work**
- **Can be creative**
- **Can take authority and then earn it**
- **Communicate effectively**
- **Desire & achieve excellence**
- **Ethical**
- **Express ideas well**
- **Follow an effective mode of action**
- **Have endurance**
- **Have good education**
- **Have good sense of humor**
- **Have integrity**
- **Have potential for improvement**
- **Have technical and professional credentials**
- **Honest**
- **Identify trends accurately**
- **Innovative**
- **Intelligent**
- **Intelligently consistent**
- **Intelligently inquisitive**

- **Know how to collect essential information**
- **Lead well**
- **Listen & learn**
- **Make good decisions**
- **Make timely decisions**
- **Manage conflict well**
- **Manage people well**
- **Motivate others**
- **Move from micro to macro and back again at will**
- **Organize and link activities**
- **Patient**
- **Perceive problems**
- **Plan ahead**
- **Resolve problems effectively**
- **Respond to legitimate demands**
- **Trained well**
- **Understand cause/effect relations**
- **Understand the role of profit in our society**
- **Unite people groups**
- **Use hindsight to look at the future**
- **Utilize resources effectively**
- **Work well with people**

Student Perceptions of Value They Add to A Project

- ***Derived from surveys of the Atlanta, Kansas City & Washington D.C. project management classes***

**Total responses from three regions = 155
mentions**

- ***Examples of frequently mentioned values added***
 - **Management skill = 60 mentions**
 - Ability to coordinate actions
 - Ability to foresee problems
 - Ability to lead and manage
 - Ability to solve problems
 - Addition of continuity to project
 - Keeping project on schedule
 - Keeping project within budget
 - Knowledge of the project management process
 - Making timely decisions
 - Monitoring the project
 - Project management skills
 - Provision of attention to detail
 - Starting projects on time

- **Technical knowledge = 53 mentions**
 - **Abilities to focus on the design process**
 - **As a technical consultant during construction**
 - **Design and construction experience**
 - **Design and construction procedures knowledge**
 - **Design review ability**
 - **Expertise in construction contract management**
 - **Knowing the project development process**
 - **Knowledge of problems and failures**
 - **Skills in client relations and reviewing contract documents**

- **GSA system & processes know how = 20 mentions**
 - **Knowledge of government process**
 - **Knowledge of procurement process**
 - **Knowledge of agencies involved**

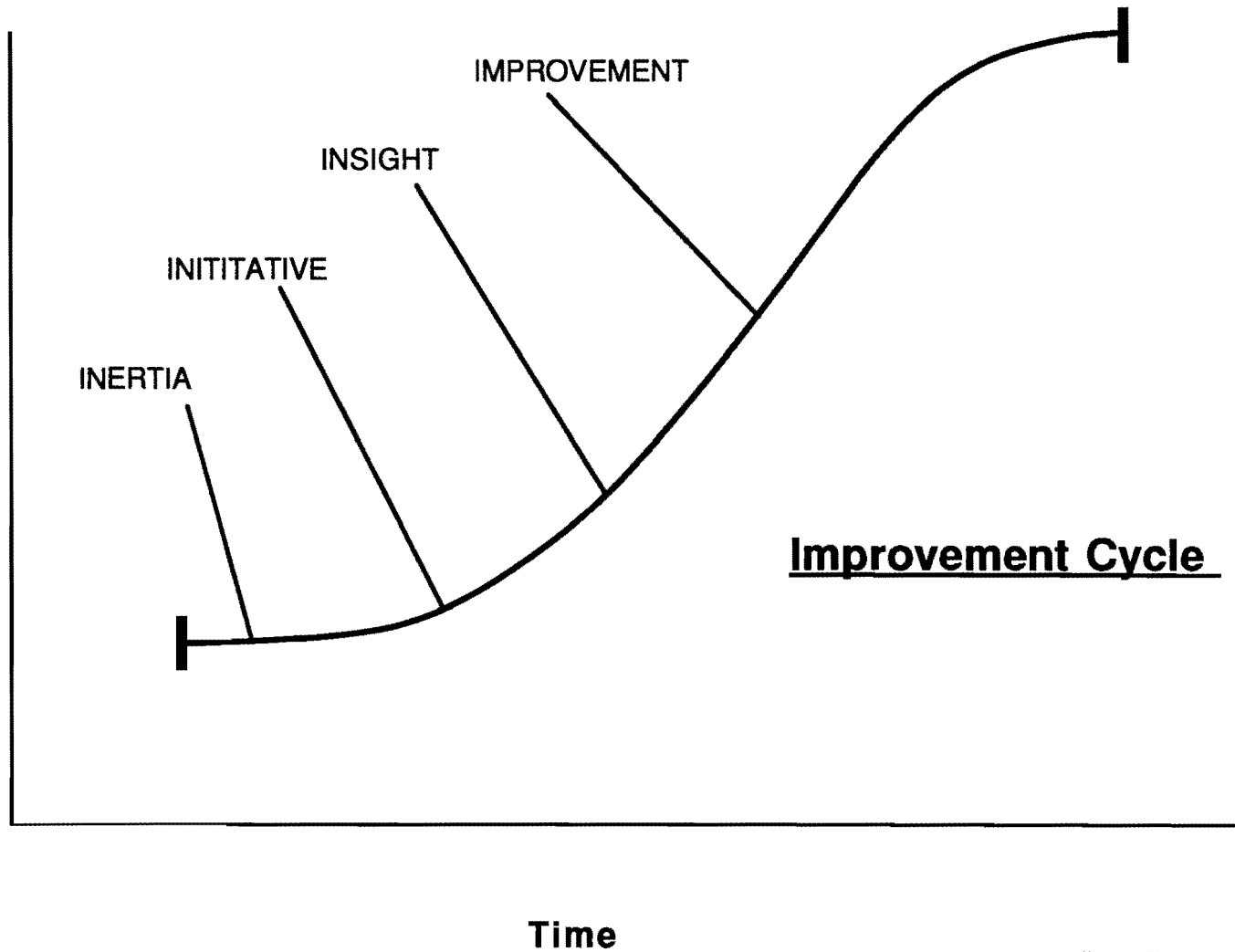
- **People and communications = 19 mentions**
 - **Experience in working with people**
 - **Ability to identify customer needs**
 - **Ability to develop clear channels of communications**
 - **Ability to translate information**

- **Eagerness to learn = 3 mentions**

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Consulting Engineer

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↑
Positive
Performance



(from The 9 Master Keys
to Management - Lester
R. Bittel)

How GSA PBS Can Optimize the Use of Project Management Training?

A. The Overview

- **Discover boundaries of talent available**
 - **Internal**
 - **External**
- **Discover boundaries of client needs**
- **Discover boundaries of GSA PBS needs**
- **Discover GSA PBS boundaries that align with client expectations**
- **Match the talents available, the client needs & the GSA PBS needs with the client expectations**
- **Begin filling in the areas of technical, professional and management deficiencies by selective additional education, training and coaching.**

B. The details - to be addressed in recap sessions

Recommendations for Improving GSA PBS Project Management Operations

- **Refine and expand the Project Management Guide**
- **Prepare a Project Management Manual of Practice**
- **Develop regional project management training sessions**
 - **To train present project managers**
 - **To train prospective project managers**
 - **To orient those who must work within the pm system**
- **Build an automated regional GSA PBS project information network**
- **Build an automated national GSA PBS project information network**
- **Build regional and national project information data bases for improved decision making**
- **Develop and implement a quality assurance program**
- **Set system of measuring value added by effective project management**
- **Improve management balancing of responsibility and authority**
- **Improve effectiveness of relations between project managers and contract officers**
- **Improve GSA user need identification and programming**
- **Improve linkages between project management and field operations during construction**
- **Develop GSA PBS project manager position description and performance model**
- **Establish project delivery management models for various kinds of projects**

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Appendix A - GSA PBS Project Management Matrix

X axis - shows the the line of action as generally articulated in GSA literature.

Y axis - shows the operational divisions of the GSA PBS.as presented in various agency guidelines

Z axis - shows GSA PBS functional operations as derived from GSA PBS literature and guidelines, and from related conversations with GSA PBS staff. We have tried to insure that each operation listed for the Z axis is a specific function that somebody in GSA PBS has to fulfill.

• **X axis** - The line of action

- X1 - Determine need - Community plan and building evaluation
- X2 - Prepare program of requirements - Prospectus development study
- X3 - Validate and approve scope & cost - Approval & funding
- X4 - Acquire site - Pre design activity
- X5 - Design project - Obtain client/tenant & regulatory input & prepare final construction documents
- X6 - Execute pre construction activities - Swing space - relocations, construction contracts, phasing, mobilization
- X7 - Develop site - Construct facility
- X8 - Build out for tenants - Tenant requirements, partitions, interiors & secondary distribution systems

• **Y axis** - Functional operating divisions

- Y1 - Management support staff
- Y2 - Real property management and safety division
- Y3 - Contracts division
- Y4 - Design & construction division
- Y5 - Real estate division
- Y6 - Planning

• **Z axis** - Functional operations to be accomplished by GSA PBS

- Z1 - Planning
 - Commuter studies
 - Economic studies and analyses
 - Estimating
 - Facility master planning
 - Feasibility studies
 - Historic preservation
 - Land planning
 - Community
 - Historic
 - Urban
 - Rural
 - Site
 - Market analysis
 - Model making
 - Political liaison

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Programming
Social planning
Traffic analyses
Zoning changes
Pro forma analyses

Z2 - Real estate

Land & improvements
Control
Purchase
Option
Right of first refusal
Exchange
Other
Site surveys
Appraisals
Zoning changes
Political liaison
Leasing
Pro forma analyses

Z3 - Architecture

Budgeting
Material research
Action planning and scheduling
Architectural design
Architectural production
Building surveys
Estimating
Feasibility analyses
Food service design
Pro forma analyses
Graphics
Historic preservation
Inspection
Inspections
Interior design
Special technical disciplines
Landscaping
Model making
Production
Programming
Quality assurance
Specifications

Z4 - Engineering

Budgeting
Pro forma analyses
Material research
Abatement
Action planning and scheduling
Acoustical
Building surveys
Civil

January 27, 1991

Construction document quality assurance
Electrical
Energy conservation
Environmental assessments
Environmental impact analyses
Estimating
Feasibility studies
Special technical disciplines
Geotechnical
Inspections
Material handling
Inspections
Life safety systems
Mechanical
Programming
Site utilities
Specifications
Structural
Telecommunications
Traffic analyses

Z5 - Contracts

Contract administration
Maintain contract data
Procurement
 Professional services
 Construction services
 Building services
 Equipment
 Materials
 Supplies
 Building services
 Security
 Concessions
Purchasing
Specifications

Z6 - Construction

New buildings
Site improvements
Building repairs
Building alterations
Construction administration
Construction planning and scheduling

Z7 - Property management

Leasing
Maintenance
Safety
Security
Space inventories
Space utilization

Z8 - Support services

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Accounting
Data processing
Education and training
Facility inventories
Filing
Graphics, reports and presentation preparation
Information systems operations
Legal
Office management
Personnel
Stenographic

Z9 - Executive staff operations
Funding
Interagency liaison
Organizational planning
Political liaison
Project management
Marketing
Sales
Other executive operations