



**Trident as the Owner's Project Manager (OPM)
for New Hampshire
School Administrative Unit (SAU) Projects**

Overview

Firmly believing that an Owner's Project Manager engagement must be more than simply a typical technical/visual consultant application or an on-site Clerk of the Works assignment, **Trident's *PROJECT ADVANTAGE GROUP*** assembles client driven and project specific senior level staff with a proven delivery model geared towards that of a trusted program and process advisor to our New Hampshire SAU clients. Our primary purpose is ensuring the opportunity to provide our SAU clients with an advantage of options over all delivery methods in providing an array of professional services for oversight, assistance and advice in real property due diligence, use/acquisitions/dispositions, design, construction, financial instrument procurement, project program and cost validation, and total project administrative services targeted at ***managing the outcome*** from inception to completion.

The Owner's Project Manager (OPM) is a member of the project team under separate contract to an SAU with responsibility to provide design and construction phase oversight on behalf of the SAU for the entire pre-planning, design, construction, commissioning and closeout process without assuming or encroaching upon any of the defined responsibilities or professional and contractual liability of the various parties under separate contract with the SAU.

A professional OPM can augment the SAU's staff by providing pre-planning design, construction, engineering, and management oversight expertise. The OPM is directly responsible to the SAU and acts in the SAU's best interest and at the SAU's direction at every stage of the project. The OPM offers advice, ***uncolored by any conflicting interest***, on such critical matters as:

- Optimum use of available funds
- Oversight of the programming phase and development of the scope of the work
- Due Diligence efforts including Site/Civil Engineer, Environmental Firm, and Geotechnical Firm prequalification, procurement & selection management
- Architect prequalification, procurement & selection management
- Builder prequalification, procurement & selection management
- Other 3rd party services prequalification, procurement & selection management
- Project schedule milestones development and overall oversight
- Value engineering and project budget reviews
- Avoidance of delays, effective management of proposed and accepted changes during construction, and effective dispute avoidance and/or resolution
- Lender requirements and requisition/payment procedures and reviews
- Project Commissioning, FF&E, and move coordination options

Because each project and every project team will vary, the application of the process should be tailored to the specific requirements and constraints presented by the SAU and the project.

- ***Managing the outcome*** requires that the SAU, before entering into a contract for any project design or other consultant services, to ***first*** contract for the services of an OPM.
- The OPM serves as the SAU's agent and consultant during the pre-planning, programming, design, construction, and commissioning/startup of all 3rd party contracts with a SAU for the specific project or master program undertaking.
- The duties of the OPM may include providing advice and consultation with respect to design, value engineering, scope of the work, validating 3rd party cost estimating, builder and subcontractor/vendor prequalification, scheduling, construction, and the selection, negotiation with and oversight of a designer and a builder, and oversight of the preparation of total project schedule.
- In addition, the OPM will assist the SAU in project participant evaluations, including written evaluations of the designers, contractors, and subcontractors if so directed.
- The OPM must be independent of the designer, builder or any subcontractor involved in the project.

The Value TRIDENT as the OWNER'S PROJECT MANAGER Provides to SAU Clients and Projects

The Pre-Planning, Programming, Design and Construction undertaking is a multi-faceted process with cost, time and quality sensitivities. Issues will arise in which the designer and the contractor (and possibly the SAU) are at odds. As a skilled advisor, the OPM must be able to translate the various issues and provide the SAU experienced and objective advice on various options to “solve” the matter, facilitate the resolution, and for all the project team to proceed on the project.

Some key points to consider in understanding the value an OPM can bring to your project include the following:

Leadership

Every project has its own set of challenges, its own unique cast of participants, and its own opportunities for success or failure – the latter may initially mean different goals for each participant, but a successful project team must be brought together on this measure of success or failure to allow for a truly successful project. A key role of the OPM is to provide a positive influence to act as a facilitator on the dynamic tension that is inherent in undertakings involving multiple stakeholders as each has competing interests that must be channeled towards the best interests of the SAU. The OPM must work with the SAU and the various project stakeholders to identify the challenges, facilitate solutions, and maintain focus on ***managing the outcome*** of the project's objectives.

Independent and Objective Advice

Because the OPM is responsible directly to the SAU and is not contractually bound to the designer, builder, or any other stakeholders, the OPM is able to weigh all recommendations, conduct fact-finding, coordinate and listen to various solutions and provide experienced and independent opinions and recommendations to the SAU. This role of the OPM as an independent advisor is not intended to diminish or assume the contractual responsibilities of any of the project stakeholders, but to provide the best, most complete information possible for effective decision making opportunities by the SAU.

Cost and Schedule Outcome

An experienced professional OPM can stimulate and suggest best practices in programming and designing to budget goals, guiding efforts of validating program analysis data and cost estimating undertakings, adding value engineering / value management analyses, and monitoring project schedule performance. Critical areas on which the OPM can assist are in setting realistic goals, building program, project budget and project schedule, controlling scope additions (“scope creep”), and conflict resolution. These important areas along with review and comment on *forecasted* design phase and construction schedule completion and project budget will keep the project moving forward.



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Allowing the Protection of the SAU's Interests

As an authorized representative of the SAU, the OPM is the point person in pre-planning, preconstruction, construction, startup, and closeout oversight. Since the recommendation is that the OPM be hired first, in most instances, the OPM will assist in the procuring of additional stakeholders for the project. As the eyes and ears, and the very conscience, of the SAU, the OPM brings an experienced view and vigilance in managing change, controlling competing interests, assessing project risk (including suggestions on risk avoidance / mitigation), facilitating issue resolution, all to allow the SAU the opportunity for control option to reduce cost and schedule overruns, and claims.

Duties of All the Project Stakeholders

Roles/Responsibilities

A SAU capital improvement project has many stakeholders including the SAU (which may have several groups), the design team, contractor/CM, OPM and, if deemed necessary, a Clerk of the Works. Each stakeholder may also have several key components or individuals, or sub-consultants.

The **SAU** may entail a Building Committee, one or more user groups, various internal SAU groups, and a financial or funding source. It is critical to the success of the project that all parties are recognized, represented and remain informed throughout the project. A clear hierarchy and communication process needs to be established for all SAU entities at the outset of the project. It is the SAU's responsibility to establish the project goals and parameters to which the other team members must strive. The OPM will assist in establishing goals and parameters at the request of the SAU. With the assistance of the OPM, the SAU will directly engage other consultants. Depending on the complexity of a project and with the advice of the OPM, additional consultants such as code review, site/civil engineer, environmental, geotechnical, HazMat, survey, building envelope, A/E Peer review, security/safety systems commissioning, signage, FF&E, special systems, and communications may be brought on by the SAU. The SAU will also need to engage a certified third-party Testing and Inspection firm(s) to insure certain code required, industry standard, and specification determined requirements are being achieved.



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The **Owner's Project Manager** is a firm that is hired by the SAU to provide advice and expertise throughout the project from inception, through pre-planning, design and construction, onto occupancy and closeout. The OPM assists the SAU in managing the other project team members and consultants and should provide assistance and oversight in the procurement of the numerous SAU's consultants and vendors. It is strongly recommended that the OPM be hired first before the designer and the builder and shall be independent of each of these firms.

A **Clerk of the Works** is typically an individual used on some projects and hired by the SAU, the OPM, or the architect for the duration of the construction phase to provide full-time on-site monitoring of the construction process if the project's characteristics deem it necessary and support the associated cost as justifiable. The Clerk provides daily monitoring and record keeping and, if so trained/experienced, ensuring that work in place meets the established project design criteria. The Clerk also records builder and subcontractor daily work force levels as well as site conditions.

The **Design Team** will encompass several disciplines, which will likely be a combination of firms. Typically the **Architect** is contracted directly with the SAU and then the Architect will hire other firms as necessary to facilitate and complete the project design. Typical design consultants to the Architect may include the following engineers: site/civil, structural, food service, fire protection, plumbing, HVAC and electrical. Depending on the characteristics or complexity of a project and with the direction or agreement of the SAU with advice from the OPM to ensure no duplication of effort, additional consultants may be required under the base services/additional services of the Architect such as code, building envelope, acoustical, lighting, sound, theater, signage, IT, security/safety, and communications/low voltage may be brought on by the Architect or consideration. The Architect and their design team members are solely responsible for the design of the project.

The **Builder** will be a construction firm that may use varying degrees of self performed work with their own employees (this option to be specifically addressed and potential impacts understood by the SAU) or subcontractors / vendors to construct the project. The main point of contact with the other project team members will be the Builder's project manager and site superintendent, or if the project is of major size/complexity, a project executive may be utilized as well. The Builder's project manager is typically responsible for overall project administration, while the Builder's superintendent is in charge of the daily operations of the construction site. The timing at which the Builder is brought into the process will depend on the construction delivery method being used. A construction management form of contract will bring the Builder into the process early on during the design phase to provide cost estimating, scheduling, constructability analysis, and other pre-construction services. Under a traditional approach, the Builder is brought on board after design is 100% complete through a bidding process.

If a Design-Build approach is used, the roles of the Architect and Builder are undertaken under a single entity with a specific agreement for same. We recommend a detailed discussion with the OPM of these available approaches as they relate to a specific project undertaking and associated possible impacts to the project.

With the complexity of a construction project and the large number of stakeholders involved, it is critical that clear lines of communication are established and made known, and redundancy in scopes of services avoided, although avoiding redundancy does not mean eliminating requisite and prudent review among project team members. From a project's inception, a clear set of goals should be established as well as an organization chart that outlines the project team and its hierarchy. A matrix of services is a useful tool for delineating each project team member's responsibilities and their services to be performed.

Summary

As more and more SAU, public, institutional, not for profit, and private entities trend towards streamlining their project delivery methods, many such clients are choosing to engage experienced professional OPM services firms to assist their in-house core group in order to guide or undertake the myriad of tasks required for effective and successful project completion and bottom line results.



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By the up-front engagement of Owner's Project Manager services of **Trident's *PROJECT ADVANTAGE GROUP's*** seasoned senior level personnel, time constrained Mayors, City/Town Managers, Directors, Fire and Police Chiefs, School Superintendents, Councils, Directors and their staffs will avail themselves to the opportunity to *best serve* their constituents in undertaking the myriad of tasks required for successful total project oversight, completion, and bottom line results.

Trident's *PROJECT ADVANTAGE GROUP - Managing the Outcome* of your project from feasibility to completion.

