

Can't We All Get Along? Managing Projects from the **Consultant** and **Government** Perspective

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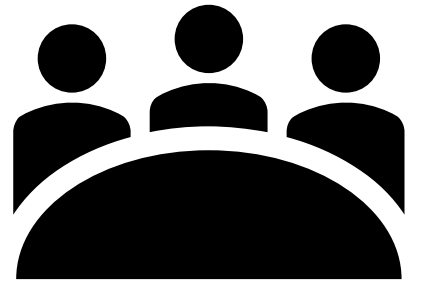
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Session Outline

- Intent of Session
- Roundtable Dialogue
 - Writing an RFP
 - Budgets for Transportation Studies
 - Scope Creep
 - Progress Reporting
 - Public & Stakeholder Engagement
 - Providing Feedback on Draft Materials

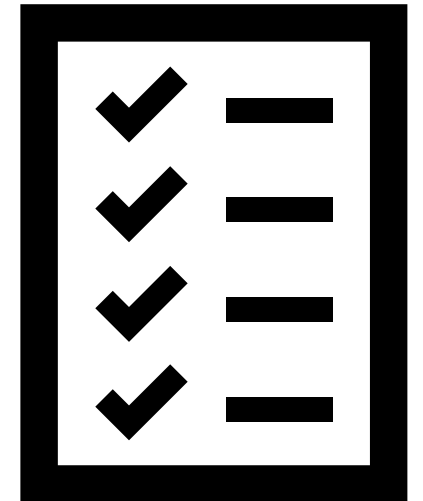
Intent of Session

- Roundtable **dialogue** where we present our ideas and experience
- Goal for today: Listen, learn, **contribute**
- **You!** add to the discussion by sharing your views
- Please Note: Project management comments are related to **transportation studies**
- Just our thoughts – **not representative of ALL**



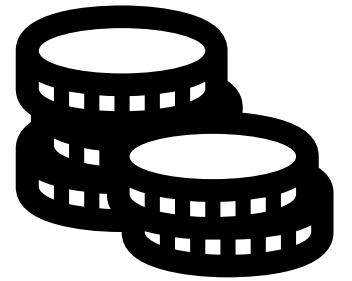
Writing an RFP and a Proposal: What to Include

- Challenged by being specific while not curbing creativity
- **Value Add** – really does add value!
- Project team composition
- Questions? Ask them!
- Numbers, numbers, numbers - **How many?**
 - Public meetings and project meetings
 - Scenarios, intersections, concept drawings
- Data availability – **what do we need to collect?**
- How the proposal should be **structured**
- How the proposal will be **scored**



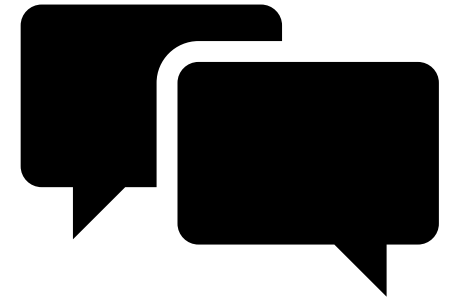
To Advertise the Budget or not to Advertise the Budget? That is the Question

- Disclosing the budget has **positive** and **negative** consequences
 - Could support well developed work plans in proposals
 - Could have the effect of increasing cost of project
- Knowing the budget indicates the **level of effort expected**
 - Consultant will tailor work program to meet the effort
 - Focuses review on **technical merits** of the consultant



Managing Scope Creep

- Consultant **wants to please**, but also must **protect**
- Additional work
 - Identify additional work before it is undertaken
 - Document the additional work and related fee
 - Receive approval before commencing
- Additional time
 - Let the client know in advance
 - Justify the request
- Fast-paced, information-everywhere world means **priorities shift**
- Consultants can build in **flexibility**
- Project kick off meetings – identify any flags



Progress Reporting

- **Cover letter**, spreadsheet or transmittal to accompany invoice
 - Document **what has been done**, what will be done and **any issues**
 - Invoice quoting purchase order, addressed and sent to correct person
-
- PM-PM Standing meetings
 - Align with internal or Council reporting requirements/timelines
 - A note on invoices - Check the contract!
 - Reduce delays in payment



Public & Stakeholder Engagement

- Public engagement has importance in government projects
- **Move away from traditional** - Need to go where the people are
- Think beyond the “Wednesday night public meeting”
- **Understand objective** of the meeting
- Delineate the **timeline** and number of reviews required for materials
- Identify **responsibilities** and **roles**
 - Who books venue, who advertises



Feedback on Draft Materials

- Build in time for gov't PM review + other review comments
 - Reduce frustration – discuss number of revisions anticipated...then add +2!
 - Discuss time savers: Send minor comments as they come, cut out word smithing, write the Executive Summary last
-
- Comments have been **reviewed before sent** to consultant
 - Collected from all reviewers and **delivered at one time**



Other topics for discussion?

Thank you!

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