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Top Ten K-12 Capital Improvement Program Best Practices

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Capital program tools and techniques continue to evolve, but one thing remains the same: the need for quality facilities. We can agree the goal is to deliver quality facilities on-time and on-budget. During the last 50 years in the K-12 industry sector, we've overcome challenges, learned hard lessons, and continued to educate team members and partners to better our service offering. From time to time, it's valuable to review best practices learned along the way.

In this article, we'll review top ten K-12 best practices gathered over the years. This list is geared towards a novice level understanding of how to manage a capital improvement program and to provide insights when planning, designing, constructing, and activating a K-12 project. Remember that every project, program, and client is unique. What worked for one location may not in another. Keeping this in mind, it's important to share lessons learned and best practices. When we do this, we make the industry and each other better. Beginning with ten, our top best practices are:

10. Distinguish between program tasks and project tasks

The distinction between program tasks and project tasks may be limited, but there are a few. Program-wide activities (such as developing design guidelines, standard operating procedures, and contracts) are valuable on a strategic level. These tasks should not interfere with the tactical level of individual project

activities. It's essential to remember the distinction when staffing a program. Program-level activities should be tackled by the Program Manager or additional staff (i.e., Program Launch Team) to address program-wide initiatives. Ideally, program-wide tasks should be developed before the start of the program to avoid delaying project execution.

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9. Track the budget

Budget tracking is extremely important throughout a project or program. Many times, stakeholders need to see monetary savings to date, expenses avoided, team member time savings, contingency tracking, and more throughout the lifecycle of a project, not just at the end. It's the role of the Project Managers to review and compile budget tracking regularly and consult the owners periodically, to keep them aware of how the project budget is tracking.

8. Engage the community

Community engagement can take several forms: a social media campaign, a citizens' oversight committee, or a project advisory team. Regardless of which initiative you choose, it's crucial to have some form of engagement for taxpayers to see and understand where their dollars are being used.

While engaging the community, make sure you understand the following elements:

- Communication takes time and effort; therefore, a person or entity should oversee the process to completion
- The process and its purpose need to be well-defined
- Be mindful of the project schedule and anticipate additional time needed for community meetings and other events

Lastly, don't forget to engage and communicate with the construction community. Establishing a task force for those with a stake in the design and construction process and holding regular meetings can be extremely useful. These team members can offer invaluable recommendations that you may otherwise miss in the process.

7. Use the “2-2-2” rule

For larger programs we are often asked, “How many Project Managers are needed?” The answer is “It depends.” We understand this may not be what you want to hear, but the amount of team members needed depends on the complexity of the projects and the scope. To better help us understand the need, we use the “2-2-2” rule. Meaning, on average, a project manager should be able to effectively manage two projects in the design phase, two projects in the construction phase, and two projects in the warranty phase. Of course, there are many factors to consider when looking at this rule:

- What are the projects' completion dates?
- Are the projects on new or existing sites?
- Are we working on an active school site?

The “2-2-2” rule is effective as a starting point when determining staffing levels by looking at the master schedule of projects and using a simple math exercise in determining how many project managers are needed.

6. Be diverse and flexible

We work with many diverse organizations within large school systems. Because of this, we believe the project team should reflect that diversity. Providing a myriad of skills, backgrounds, ethnicities, and cultures strengthen the overall project team and provide unique insights into the project.

Flexibility is equally as important. Although we hope a project team will remain the same throughout the duration, we understand this isn't always the case. People come and go and companies change and merge; because of this, we need to be as flexible as possible. Be prepared to view all options and understand trends change frequently. Also, building flexibility in construction delivery can provide financial benefits. There is value in being able to manage a variety of contract strategies, which also builds rapport with the overall team.

5. Recognize some things are out of our control

Some items may simply be out of our control due to various reasons. New building codes could be passed, an unfunded educational mandate could be approved, or internal issues could arise. Whatever the situation is, our job is to plan the work and execute the plan, providing logical recommendations based on our experience. It's worth mentioning that teams should understand that some decisions will not follow the plan and/or recommendations and can be solely based on other factors, and we have to be okay with that.

4. Build in contingencies

Whenever possible, we should advise clients to build in contingencies. In terms of both budgets and schedules, having multiple levels of cushion is important. Don't worry about having too much; this will come in handy during an unexpected setback. And if you're lucky to not need it, then you may be able to do something extra for the project. The client will be happy, and you can rest assured knowing emergencies will be handled.



3. Understand the contract

Each staff member and subconsultant needs to know and understand the contract (and follow it). Also, remember to document everything. Managing meeting minutes and documentations will come in handy and ensure all team members are on the same page during each stage of the project.

“Communication is key for a successful project. Be transparent and properly manage the expectations of team members and the client.”

2. Properly manage expectations

Communication is key for a successful project. Be transparent and properly manage the expectations of team members and the client. Stay away from making promises you can't keep. If you find yourself face to face with a difficult issue, ask for some time to reflect, then come back to the team with suggestions to tackle the roadblock head on.

The adage of “under promise and over deliver” rings true. All strategic decisions should set up our clients (and ourselves) for success. Everyone remembers when deadlines are not met and when projects are over budget. To avoid this from happening to you, encourage proactive decision-making, over communication, and tackling problems head on—simply good project management!

1. Know the environment

Quality learning environments impact education (i.e., the layout, finishes, indoor air quality, lighting, noise levels, cleanliness, technology, furniture). If done properly, these components work together to provide a quality educational environment where students and staff have lower absenteeism, feel motivated, and increase performance and learning.

The project team supports and enhances the education process—the pedagogy used in the classrooms. The greater knowledge and understanding we have of the environment and its processes, the better the project outcome. We can do this by:

- Talking with educators and really listening to what they have to say
- Learning and understanding the “lingo” and pedagogical philosophies
- Letting our collective knowledge drive the design of the environment
- Seeking and understanding new trends in education

Remember, when working in a K-12 environment, it's all about the children. They learn better in better environments.

About CBRE | HEERY and K-12

CBRE | Heery provides program management, construction management, architecture, interior design, engineering, and commissioning services. Through program management and project management services in the K-12 education market nationwide, CBRE | Heery has delivered \$33 billion in improvements in 175,000 classrooms. Clients include more than 190 school districts.

About the Author

David Waggoner is a 28-year veteran with CBRE | Heery and serves as the national market leader for K-12 Program Management services. He is a former Chair of the International Board of Directors of the Association for Learning Environments (A4LE). In 2016, David was elected to become a Fellow of A4LE, a mark of excellence that represents outstanding achievements and contributions to the association and its mission.

He is a registered Architect, a LEED® Accredited Professional, and an Accredited Learning Environment Planner (ALEP). A native of Texas, David graduated from Texas A&M University with a Bachelors of Environmental Design and a Masters of Architecture.

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