Project
Mangement
Automation

Hello!

I am Mike Zanghi

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A little about me:

▷ 27 years in Healthcare facilities management
▷ Director of Facilities, Highland Hospital, Rochester, NY
▷ Manage all aspects of construction, from space planning to closeout
▷ Implemented a web-based construction management system to manage $15M in construction per year

Project Management

Improving with Technology

"

*'Construction is falling behind
in the innovation race'*

Richard Branson

Project Management Automation

▷ Similar to the Back Office automation of decades past

▷ Most people think of scheduling when in comes to project management software

▷ The software must be owner focused

Project Management Platform

Project Management software must serve as a platform for all project information

Owner Information Needs

▷ Vendor management
▷ Cost management
▷ FFE Acquisition
▷ Document Management
▷ Project Communications
▷ Change Management

Project Managment
- the owners perspective

Pre-Construction	Construction	Closeout

- Design
- Budgeting
- Bidding

- Milestone Schedule
- Budget Conformance
- Change Order Management

- Financial
- Document Management
- Warranty

Brenchmarking

Benchmarking the Project Management function requires:
▷ Understanding the scope of services delivered by staff
▷ Level of support from other departments
▷ Amount of external vendor involvement

Main Platform Functions

Documentation

- Single source of information
- Available to all participants
- Role based security
- Communication

Processes

- Captures organizational standards/rules
- Routes tasks automatically
- Documents actions/ timestamps at each step

Platform Connectivity

Entities

- Internal Customers
- Design Teams
- Contractors
- Suppliers

Systems

- Financial
- Capital Planning
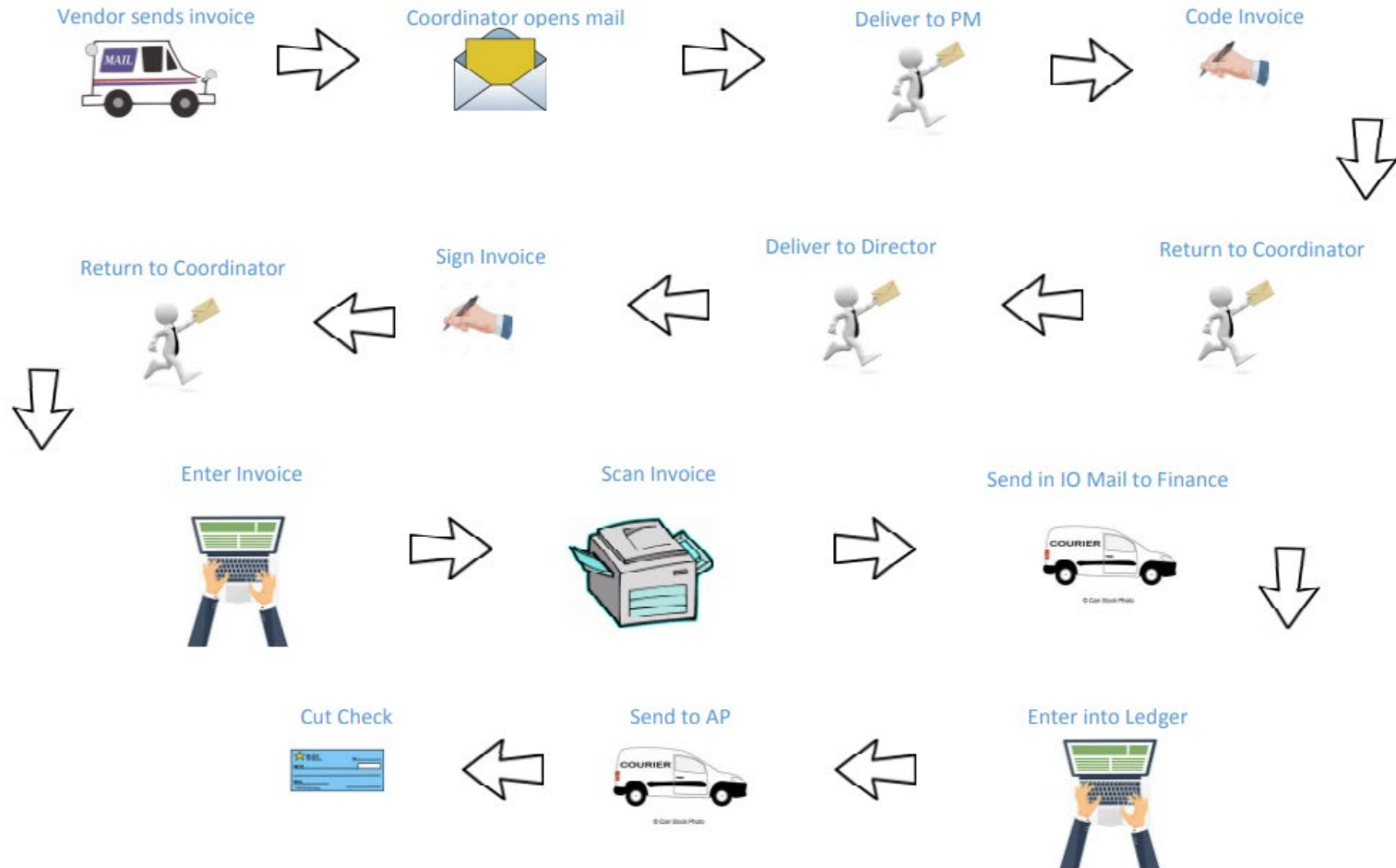- Purchasing

Staffing Impact

A well designed platform can:
▷ Reduce labor
▷ Focus staff on higher value activities
▷ Reduce risk
▷ Improve communications
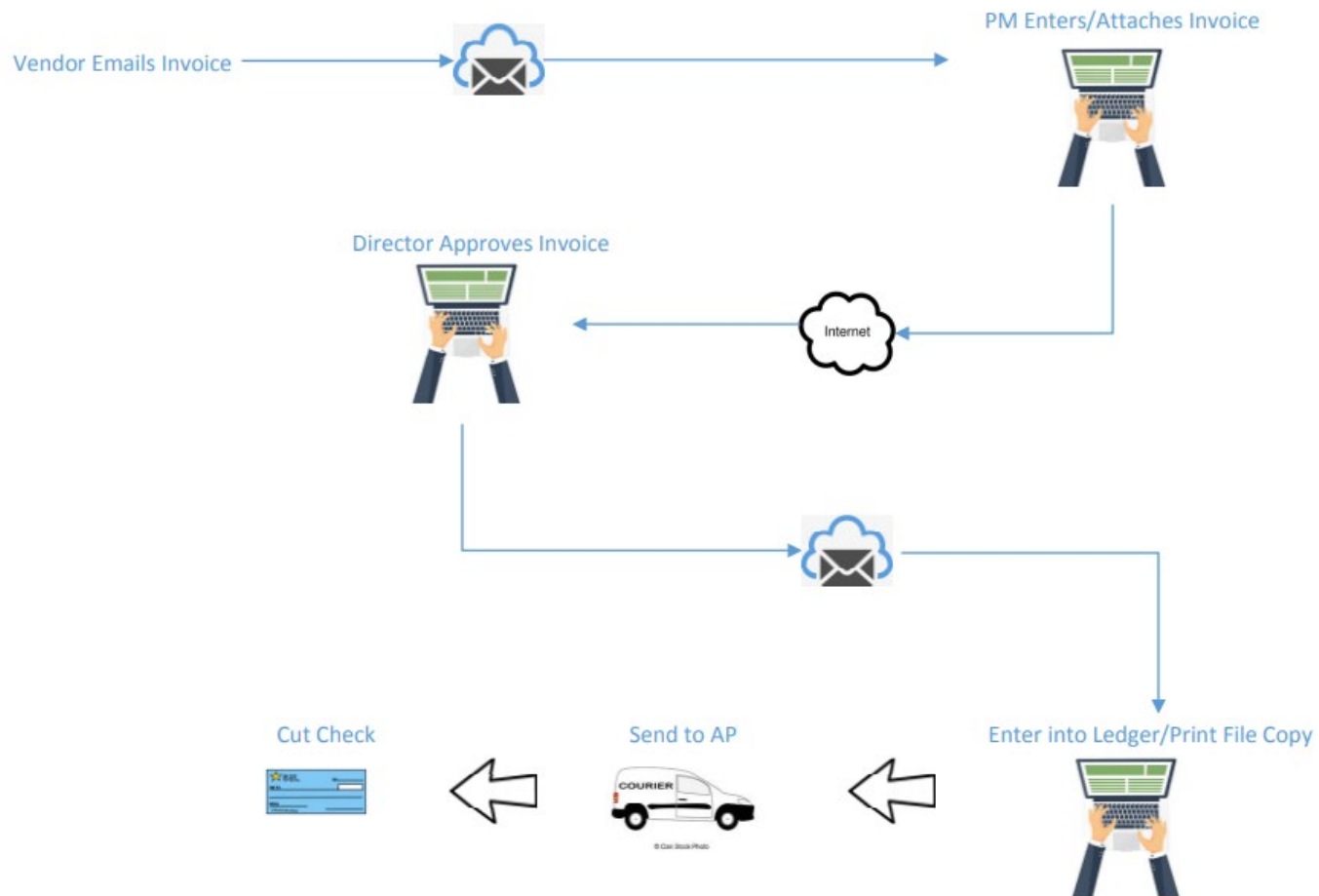▷ Increase compliance with standards

Reducing Labor

Invoice Approval – an example:

▷ Reduce hand offs

▷ Reduce processing steps

▷ Eliminate paper

▷ Eliminate physical transportation

Invoice Approval - before

Invoice Approval - after

Higher Value Activities

▷ Easy data consolidation across projects
▷ Speedy report generation
▷ Dashboards/scheduled reporting

Reducing Risk

▷ No lost documents
▷ Policies enforced
▷ Data is equally up to date for all participants
▷ Role based security

Improved Communications

▷ Design team/contractors/owner have access to the same information

▷ Participants automatically notified when activity takes place

▷ Communications automatically archived

Improved Compliance

▷ Organizational processes can be codified in the system

▷ Workflows ensure processes do not deviate from policy

▷ Actions taken automatically move the process to the next person

Downside of other options

▷ Paper – lost documents, manual transfer, limited accessibility

▷ Email – information silos, inconsistent distribution

▷ Excel – not easy to consolidate data, nearly impossible to keep everyone up-to-date

Thanks!

Any questions?

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Q: How does data and risk management impact facility staffing?
A: A well thought out Project Management Automation system can reduce the labor necessary to manage projects. It can also decrease risk from lost data and missed communications.

Q: What aspects or functions of your facility staff do you feel are most critical to mitigate risk and to adequately manage data?
A: Developing and following processes are critical for managing risk. Data collection from the frontline is critical for managing data.

Q: Are your facility and infrastructure data managed in a seamless system or in multiple applications that do not interface? How much error do you feel is in your data and how do you mitigate that?
A: Maintenance, projects and finance are separate systems. There is not much error (or cross-over) between projects and maintenance. There is a fair amount of error between projects and finance, project data is reconciled to the finance data on a regular basis.

Q: How much of your staffing time is dedicated to managing your facility data and how much of a priority do you put on it.
A: This is hard to quantify because almost every aspect of the work involves managing data.

Q: How is your data used to identify and forecast facility investment requirements and how do you prioritize those investments?
A: Our facility is small enough that we do not need models for forecasting investments. Prioritization is based on impact to the clinical functions.

Q: When your plan your future facility investment requirements, how do you account for the degradation of your inventory in your forecast of requirements? (Said another way, do you feel you are investing enough in the sustainment of your facilities that you are not creating a backlog of work orders that causes additional maintenance burden and risk?)

A: This is an informal process where infrastructure is prioritized along side clinical needs.

Q: How do you integrate risk matrices with your facility investment decisions and how do you manage the data for those decisions?

A: We do not use risk matrices.

Q: How do you ensure you have adequate facility manning to execute your facility investments?

A: Project staffing is capitalized and is included in the project budget.

Q: What are the key considerations medical center leaders need to take into account in staffing their facilities unit to effectively manage risk, data and project planning and delivery?

A: Two key considerations are the scope of services supported and the amount of work the internal staff do (vs. outside resources).