Managing User Expectations

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Introduction

So you thought your job is about putting up a building?
Relational Management

• In today’s world, the product is about, for, and done with people
• Building relationships
• Building trust
• Start with guiding principles
  – Integrity
  – Commitment
  – Empowerment
  – Creativity
  – Collaboration
  – Equity
Managing Expectations

- The biggest obstacle to overcome on any project is meeting expectations.
- Any project is 20% process and 80% relationship.
- Programming – where expectations are created and set in concrete.
- Design phase – avoiding the major changes to the program during design.

*OFF THE MARK* by Mark Parisi

WELL, THIS HAS BEEN A TOTAL FIASCO...

EARLY ATTEMPTS TO DESIGN BY COMMITTEE
It Can’t be Done with “Smoke & Mirrors”

- Establishing a campus process & policies for decision-making
- Understanding the process
- Training your staff
## Cal Poly
### Major Capital Outlay Projects
#### Campus Implementation Process

<table>
<thead>
<tr>
<th>Steps</th>
<th>Items Covered</th>
<th>Responsibilities</th>
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<tbody>
<tr>
<td><strong>I.</strong> Project Concept and Scope</td>
<td>Consistency with the mission of the university, timeliness of the project, strategic planning, risk assessment.</td>
<td>Planning: Project Sponsor (Vice President, Dean or Head of Unit), Coordinating Team (established for the project)</td>
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<td><strong>II.</strong> Master Plan Consistency</td>
<td>Compliance with the Campus Master Plan, its Elements and Area Plans for sections of the campus.</td>
<td>Facilities Planning and Capital Projects (FPCP), Executive Vice Provost/CPO, Coordinating Team, consultants as needed</td>
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<td><strong>IIIa.</strong> Program, Business Plan and Preliminary Site Plan (general direction)</td>
<td>Building program, concept plan, financial feasibility, campus operational impacts analysis, including information technology; pre-construction budget and funding.</td>
<td>Coordinating Team, FPCP, Executive Vice Provost/CPO, Other committees and consultants as needed</td>
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<tr>
<td><strong>IIIb.</strong> Program, Business Plan and Preliminary Site Plan (detailed analysis and planning)</td>
<td>Site analysis, building program, concept plan, financial feasibility, campus operational impacts analysis.</td>
<td>FPCP, consultants as needed</td>
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<td><strong>IV.</strong> Schematic Design and Environmental Review</td>
<td>Schematic design, CEQA process, Board of Trustees approval process</td>
<td>FPCP, consultants as needed</td>
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<td><strong>V.</strong> Working Drawings and Construction Documents</td>
<td>Development of technical drawings and specifications for construction</td>
<td>FPCP, consultants as needed</td>
</tr>
<tr>
<td><strong>VI.</strong> Construction</td>
<td>Site and building construction, approval of construction budget and funding</td>
<td>FPCP, consultants as needed</td>
</tr>
</tbody>
</table>

**NOTES:**
- Shaded steps involve conceptual development and policy review to establish project direction.
- Steps generally progress in the order shown, but overlap in time.
- Depth of involvement of the entities listed above may vary depending on the size and complexity of the project.
- Except for Master Plan development and major projects, such as Student Housing North, which have extensive involvement processes, consultation with faculty and students at the policy level has been accomplished primarily through their representation on the Campus Planning Committee, the Landscape Advisory Committee, Biological Sciences Advisory Committee and the Academic Senate Budget and Long-Range Planning Committee.
24/7 Management

- Commitment to the project
- Patience with people
- Creativity – thinking outside the box
The Communication Pipeline is Always Open

• It’s the key to relationship building
• The art of communicating – staying on the “high road”
• Listening for opportunities
• Communicating when there is nothing to say
• The Team Approach – A Cal Poly Model
Facilities Planning & Capital Projects
www.facilities.calpoly.edu
1. What are ways we can help to establish the correct expectations and maintain them?
2. What are ways you can integrate guiding principles into the day-to-day of managing projects?
3. What are ways you can improve communication and attitudes between users, consultants, and contractors?