

**Title:** PPM/SETC Teamsters Project Review Process  
**Department:** PPM Engineering Services  
**Effective Date:** March 21, 2018

## **PURPOSE**

The purpose of this SOP is set in place procedures for PPM/SETC review and consideration of new projects, and determine if these projects should be handled internally by PPM or be managed by FPDC, JOC or other contracted services.

## **RESPONSIBILITY**

FPDC Minor Capital (& JOC) Program Manager (Maureen Shideh) is responsible to ensure that all new projects that meet the accepted criteria (see below), are passed through PPM for review prior to any action taken by the designated Project Manager.

PPM Senior Director (Jason Wang) and/or Director Engineering Services (Doug Wells) is responsible for ensuring that project(s) are forwarded to the Unit 6/SETC Stewards (Chris Rooney, Reggie Castro) for review/consideration and to notify FPDC of appraisal/decision.

All parties are responsible for ensuring that the notification process is executed in an effective and timely manner.

## **PROCEDURES**

### **Minor Capital Project – PPM/Unit 6 Project Review Process**

Projects that may be contracted out will be reviewed with Unit 6 Stewards as follows:

#### **1. Pre-Project Report from FPDC**

Minor Capital Program Manager (Maureen Shideh) forwards PPM Management/Unit 6 Representatives (Jason Wang, Doug Wells, Chris Rooney, Reggie Castro) a Weekly JOC Coordination Report, containing new Pre-Projects with status *PPM Evaluation*. This is a list of new proposed projects from both FPDC and PPM that may be performed under the JOC Program or by another form of contract.

- a) Report sent by Maureen Shideh (MCP)/Carlos Miranda (JOC PM) on Wednesdays by the close of business.
- b) If Unit 6 Stewards are interested in pursuing a project they will identify the project as one that will proceed to Step 2 by the immediately following Monday morning at 10:00 a.m.
- c) Doug Wells (Dir. Eng. Serv.) and Unit 6 Stewards review the Weekly JOC Coordination Report in the PPM Operations Team meeting on Monday morning. Dir. Eng. Serv. provides an update to FPDC at the following Tuesday JOC Coordination Meeting.
- d) Project status is not changed until PPM opts out of the project.
- e) Projects which are opted out at the pre-project phase are reviewed for JOC or another form of contracting.

f) Projects which are determined to be explored further by PPM follow Step 2 below.

## 2. New Project Review

New projects for internal performance consideration are reviewed by Unit 6 Steward(s) and PPM Management (i.e., Chris Rooney, Reggie Castro, Jason Wang and Doug Wells).

a) Notification occurs via email and includes the following information

- i. Project Name
- ii. Location
- iii. Scope, plans, specifications
- iv. Schedule
- v. Restrictions

b) Unit 6 Stewards review jobs with PPM Management, PPM Shop Supervisors and PPM Estimating and assess current workload, staff availability, and suitability of projects.

c) If a job is believed to be potentially viable for PPM involvement, Unit 6 Stewards review job recommendation(s) with Engineering Services Assistant Director and/or Director, (i.e. relevant AD and Doug Wells,) to ensure there are no future/queued jobs that the shop may not be aware of that may take priority.

d) Within 48 hours (2 business days) Engineering Services Assist. Director (Todd Andrew) or Director, (Doug Wells) will notify the FPDC Minor Capital Program Manager, (Maureen Shideh) via email (and cc Unit 6 Stewards) that PPM intends to submit a cost estimate for the project.

e) Should PPM choose to estimate the project, the FPDC Minor Capital Program Manager, (Maureen Shideh) will notify the end-user(s) that the project has been reassigned to PPM – at which point a PPM Estimator, (i.e. Steve Reeves or Dave Unger) will be the point person for the project.

f) No later than Three (3) weeks from start of bidding, PPM Estimating will provide an estimate to the end user.

## 3. Emergency Work

In the case of an emergency PPM Management will make reasonable efforts to notify the Unit 6 Steward(s) of the situation and involve Unit 6 in decisions around work to be done. Given that typical emergency response time decisions require “time is of the essence” decision making, a partnership is required to deal with emergency work.

## 4. Project Exemptions

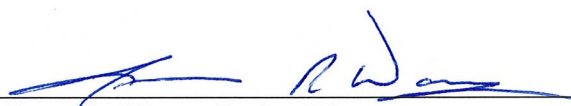
### a) Major Capital Projects

Projects that are CSU Major Capital Outlay Projects (greater than \$635k or the current published threshold) are excluded. Major capital outlay projects are by definition non-delegated projects and require CSU CPDC/BOT approval and follow SUAM 9000-9005 (Capital Outlay and Public Bidding) & 9700-9843 (Construction Management)

### b) CSUN Housing & Auxiliaries

Projects performed by or for CSUN Housing and Auxiliaries are excluded.

APPROVED

  
Jason R. Wang, Senior Director

05-18-18

Date