Purpose:

To ensure major capital development projects are reviewed against University plans and objectives and that project closure is consistent across Massey University.

Policy:

All major capital development projects must undertake an Independent Project Completion Review 12 months after commissioning, initial occupancy or go-live date. This applies to construction projects over $5M and Information & Communication Technology (ICT) Projects over $2.0M. This policy will also apply to all projects which do not reach these financial thresholds, but have been assessed as high risk in accordance with the Project Management Policy.

Provision is to be made in the operating budgets to cover the cost of the Independent Post Completion Reviews.

The Post Completion Review must address business case review, financial review of benefits and costs, briefing by users, specification, design, procurement methodology, construction or implementation and satisfaction of occupants/users, associated benefit realisation, and will include (depending on its complexity) any or all of the following: Post Completion Report (PCR), Post Project Review (PPR), Specific Design Review, (SDR) and Post Completion Evaluation (PCE).

Definitions:

PCR

Project Completion Report – This report focuses on levels of service, financial and project management Key Performance Indicators established in the related procedures for construction, and ICT projects: They include, but are not limited to, the following:-

• Final project cost/financial analysis with comparison to project estimates through all design and implementation stages, including tender price, completed cost and life cycle costing.
• Final spatial information for building projects [Gross Floor Area (GFA), Usable Floor Area (UFA), UFA/GFA proportions/ratios and spatial efficiency data – using TEFMA standards].
• Comprehensive review of procurement methodology, including adherence to policy, procedures, identification of risks & gaps and improvement opportunities.
• Comprehensive review of value for money against sector key performance indicators.
• Adherence to project timelines, management time assessments, scope variations and associated cost impacts.
• IT System/solution performance against industry metrics.
• Business case review to test achievement of project justification and objectives.
Alignment with the Strategic Plan and sub-strategies, Investment Plan, Campus Development Plan, Information Systems Strategic Plan and Capital Asset Management Plan.

**PPR**

Post Project Review – The PPR is to cover specific project aspects such as design, project management, funding regimes if outside the ordinary, etc.

**SDR**

Specific Design Review – The SDR normally focuses specifically on design discipline aspects, e.g. structural, civil, fire engineering, building services/mechanical, architectural, network architecture, etc.

**PCE**

Post Completion Evaluation – The PCE (also known as Post Occupancy Evaluation) is designed to focus on briefing, design, changes required and user satisfaction with the project/end product. This applies to Construction and ICT Projects.

It would be normal for the PCE to survey users on items including: health and safety, facility or IT system functionality, building services, environmental aspects, personal matters, spatial review, cost review, input from Facilities Management and/or Information Technology Services, feedback from the consultants engaged in the project, remedial actions, procedural and project management improvements, etc.

**Independent Project Completion Review**

- The purpose of an independent review is to critically assess the achievement of project outcomes and provide feedback that allows for continuous improvement in the project management, design, construction and implementation processes. This leads to improved performance for users, and improved management and financial outcomes across the University.
- “Independent” means the appointment of a company or person, who shall:
  - Be suitably qualified and experienced in project completion reviews
  - Not be an employee of Massey University
  - Not be a company or person that has been associated with the development of the project in any way.

**All Post Completion Reviews shall ascertain the following:**

- If the building or IT Solution has delivered and met the original user requirements, design philosophy and client instructions/facility specifications as well as efficiency of design and functionality.
- Whether the user groups who occupy and/or use the buildings or IT solutions are satisfied with the end product (specific high points), or not (specific low points – what and why?). This should also include Facilities Management, Information Technology Services and design, engineering and project management consultant feedback.
- The end product is functionally and spatially efficient.
- Highlight what changes (if any) had occurred in the tertiary education sector since the buildings/project was briefed, designed, completed and up to the present time, and what needs to be changed/recovered.
- Determine any remedial work required for consideration/action.
- Advise on any general or specific project control, management, health and safety, cost and design efficiency observations.
- Provide details on the achievement against project budgets and the realisation of financial benefits stated in the business case.
- Provide details on the effective and efficient use of contingency funds
- Review the effectiveness of the contract in mitigating risk and contributing to a successful project outcome, consistent with the project scope.
- Provide a statement of Health and Safety compliance with building facilities
Reporting

All Post Completion Reviews will be provided to the Audit and Risk Committee of University Council for information.

Review Management

Capital funded projects, plant, equipment and books shall be reviewed and closed in accordance with the ‘Related Procedures and Documents’ referenced in this policy. The review specification for each project will be established after approval of the business case and will be led by the National Capital Manager in consultation with Risk Management and project steering groups.

Audience:

All staff

Relevant Legislation:

None

Legal Compliance:

The Tertiary Education Commission capital asset management (CAM) and financial reporting requirements.

Office of the Auditor-General New Zealand, audit and financial reporting requirements

Accident Compensation Corporation (ACC) Workplace Safety Management Programme audit (8.6) that “health and safety component is part of any post contract evaluation”.

Related Procedures and Documents:

Capital Planning and Approval Process
Business Case Policy and Procedure Financial Monitoring and Control Policy
Delegations of Authority Policy and Documents
Request for Financial Authority (RFA) Procedure
Procurement Policy and Procedures
Tenders Board Terms of Reference and Procedure
University Campus Development Plans
Information Services Strategic Plan
Risk Management Policy

Professional practice notes provided by IPENZ, NZIA, ACENA, NZIQS, PMI, Massey University Project Management Office resources, previous Post Completion Reviews and PCE’s for major capital development works projects at Massey University.

Document Management Control:

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