



**OCTA**  
PROJECT MANAGEMENT

# PROPOSAL

*Company Name*



# Table of CONTENTS

<b>1. Introduction .....</b>	<b>2</b>
<b>2. Project Team .....</b>	<b>4</b>
<b>3. Project Structure .....</b>	<b>6</b>
<b>4. Project Methodology .....</b>	<b>7</b>
<b>a. Planning and Organising</b>	
<b>b. Monitoring and Updating</b>	
<b>c. Reporting</b>	
<b>d. Cost Control</b>	
<b>5. The Process .....</b>	<b>10</b>
<b>6. Company Culture .....</b>	<b>11</b>
<b>7. Unique Selling Points .....</b>	<b>12</b>
<b>8. PROJECT PROPOSAL.....</b>	<b>14</b>
<b>Appendices .....</b>	<b>16</b>
<b>A. Staff Curriculum Vitae</b>	
<b>B. Project Profiles</b>	
<b>C. Standard Conditions of Engagement</b>	



# INTRODUCTION

Octa is pleased to have the opportunity to submit this proposal for ...

## *Our Team*

The Dunedin Office of Octa Associates comprises eight full time professional Project Managers and two support staff. We are confident that from we can provide a strong team to successfully deliver and assist with your project.

## *Current Projects*

Octa is currently providing. You can read more about our projects in our company profiles.

## *Special Requirement for your Project*

We note the requirement for early engagement so that Octa can be involved in the detailing of base project documentation. Also with early contractor engagement there is the opportunity to communicate clearly the «Client\_Name» of working and high standards of safety required to successfully undertake the project. We would look to work quickly to identify options for making certain that contractor and subcontractor engagement is correctly weighted to the required level of H&S alongside a strong H&S mantra and safety record. While the level of H&S implementation required is still being accurately determined, we are confident that we can work alongside the project team to identify and if necessary implement and action the necessary changes.

*Leading the way in  
Project Management since 1973.*



*Octa is the most experienced independent professional project management company in New Zealand.*

## In SUMMARY

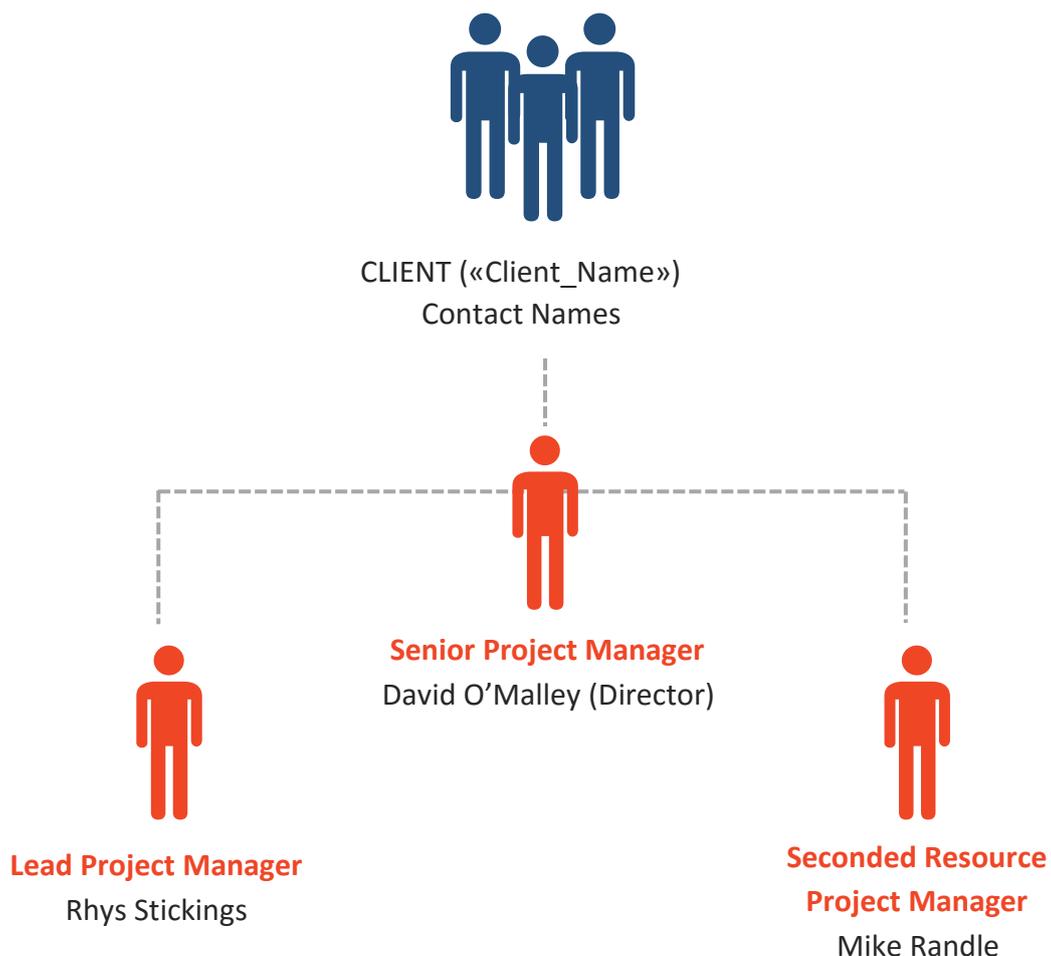
Octa is well suited to provide the required services to «Client\_Name». We have proven project management systems, effective Health & Safety approach, and will provide skilled and experienced staff to effectively assist with your project.

# Project TEAM

The Dunedin Office of Octa Associates comprises eight full time professional Project Managers and two support staff. Should additional resource be required at any stage throughout the delivery of any of our projects, we have the personnel and expertise available within other Octa Associates offices to assist.

Octa is proud to have a close working relationship within all their branches ensuring that you will receive the same great service throughout New Zealand.

When we assemble a project team, our approach is to look at the skills required to successfully deliver the project, and select our personnel to provide our client with the best possible service. We have highlighted project managers who have the skills and experience to add value to any project undertaken by «Client\_Name».



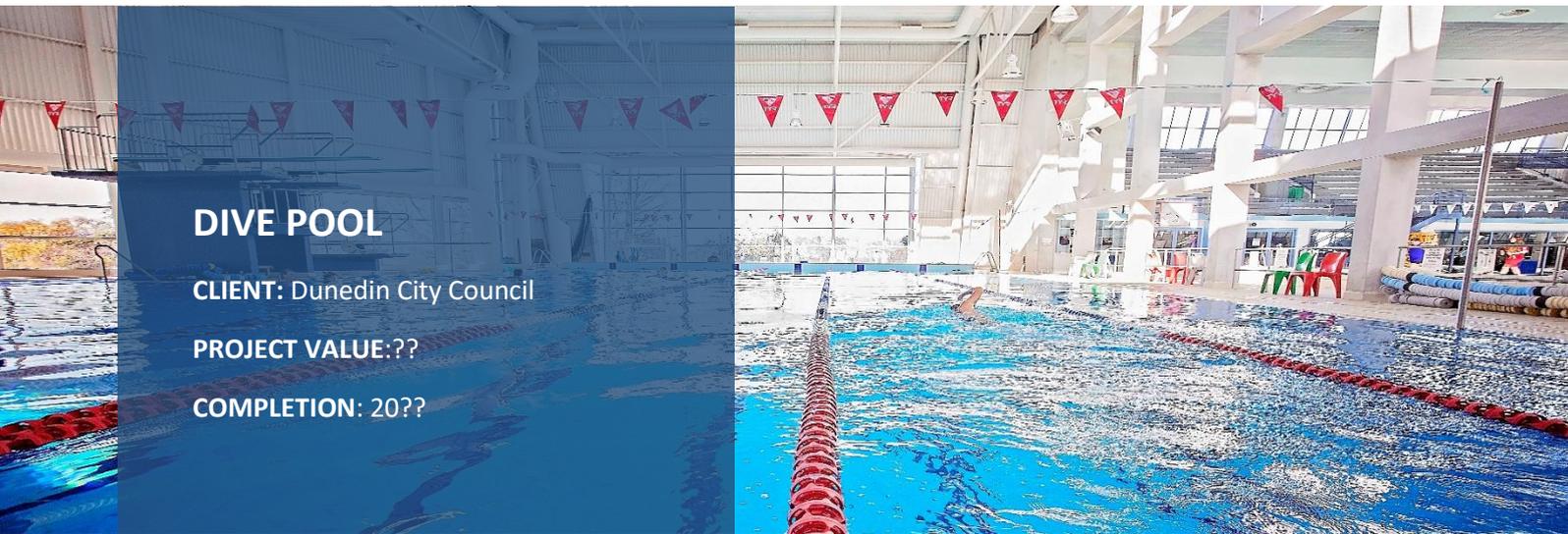


## DUNEDIN CASINO

CLIENT: Dunedin Casino

PROJECT VALUE: ??

COMPLETION: ??



## DIVE POOL

CLIENT: Dunedin City Council

PROJECT VALUE:??

COMPLETION: 20??

# Project STRUCTURE

One of Octa's key strengths is our ability to provide a management structure to complex technical projects, and supply competent and proactive project management personnel for these working environments to deliver successful projects. These roles include managing design teams, and managing projects in terms of scope, quality, time or cost, and managing clients and their expectations around the delivery of client focused solutions.

Our approach to service delivery is to:

- Maintain focus and clarity around key aspects of the project, in order that the project delivers on expectations and complies with established timeframes
- Create a collaborative work environment where risks are actively managed, and the whole project team remains informed of the project direction and constraints
- Create a project environment which allows innovation to develop and information on the project to be actively shared in order to clearly inform other aspects of the project
- Maintain focus on the general requirements of quality and accuracy through the delivery of the project services.

***“Project Management is 100% of our business and includes over 250 completed projects and over \$2 billion dollars of construction.”***

# Project METHODOLOGY

**Octa Associates call this analyzing the project delivery alternatives and formulating the project strategy.**

Octa's methodology includes organising meetings, working parties and/or presentations as required to provide information, answer questions, receive feedback and integrate same. Octa also prepares full and detailed reports throughout the process as required and at the end of each project phase.

## PLANNING AND ORGANISING

At the onset of each project, Octa will develop a Project Execution Plan (PEP), which will capture the frameworks to be followed in a bespoke process which aligns with the Client's requirements, and which will form the groundwork for this project environment.

This PEP will capture core aspects such as time, cost and quality. However, the PEP also needs to assess:

- the risks through the project, the impact that these could have, and how these will be managed
- defining reporting lines and structures
- defining decision making processes
- clearly setting out objectives and goals from the process
- levels of authority within the project team
- where innovation may be able to be implemented possibly would benefit, and
- how procurement processes will be managed.

The PEP will produce a structured approach to project delivery which will provide a framework which will support the project through all phases, and manage the project in a no surprises and low risk environment.

## MONITORING AND UPDATING

A best for project approach requires the management of project risks and scope, and involves the continual monitoring of the project direction. Changes in scope are inevitable in any project and could be anything from minor modifications to significant additional works. It is essential that communication is maintained in order to address any such changes in a professional and amicable manner, while respecting the values of the other parties. Such an outcome is a core component of a collaborative environment.

## REPORTING

Octa associates reporting is centered on control and based on management concepts that have been proven in the rest of the business world.

Control is the critical issue for a project client. It is the security check that an endeavor will be made to glean the necessary information and distribute it to the decision-makers. Whether it is at the Board or at Site, Octa's reporting systems are designed to:

Highlight the key issues that have significant impact on the overall project

Provide the client and the manager with a clear view of the vital signs of the project

- Track and document the decision process, focusing attention on outstanding and unresolved issues
- Measure the performance on the project

A wide angle focus is therefore developed to give the project readers a panoramic view of the work. However, sometimes a tiny detail has disastrous potential, so Octa's reporting has the ability to zoom in from its wide angle view, locate the troublesome detail, and magnify its repercussions.

Octa Associates have several levels of progress reporting. Reports following the monitoring of onsite work are specific to progress and actions required by various designers or trades are noted.

Reports for a site or building committee are more general, and those for presentation at Board level give a concise bird's eye view.

## COST CONTROL

Octa Associates believe that there are five equally important functions of cost control:

1. Budgeting
2. Value Engineering
3. Estimating
4. Procurement
5. Project Accounting

Octa know that Project Accounting is vastly different to Financial Accounting, yet invariably that is where project accounting ends up. Octa Associates believe that for a multi-contract project each contract should be controlled from its smallest element upwards. Also, that project people who authorize contract expenditure should have a system that keeps them informed on the tracking of costs, but does not involve them on undue administration – after all their job concerns projects, not accounts at clerical level.

In recognition of this Octa Associates have developed cost control and cash flow computer programmes that link into their time management work. Time and cost are so closely related.



## OTAGO SETTLERS MUSEUM REDEVELOPMENT

CLIENT: Dunedin City Council

PROJECT VALUE: \$38.0 million

COMPLETION: 2013

# The PROCESS

Octa's project management processes generally align with the project management processes and procedures set out in the Project Management Institute's Book of Knowledge (PMBOK). The knowledge areas are:

- **Integration Management** – project plan, execution, change
- **Scope Management** – planning, definition, verification, change
- **Time Management** – activity definition, sequencing and duration, programme development and control
- **Cost Management** – resource planning, cost estimating, budgeting and cost control
- **Quality Management** – planning, assurance, control
- **Human Resource Management** – organizational planning, acquisition, team development
- **Communications Management** – planning and distribution, reporting, closure
- **Risk Management** – identification, quantification, response development and control
- **Procurement Management** – planning, solicitation, source selection, contract administration, closeout

Octa understands the general requirements of development within any sector. We are familiar with the requirements of maintaining business and operational continuity, through minimising disruption and meeting pre-determined milestones, while preserving requirements of security and hygiene.



## TUG BOATS

CLIENT: Port Otago, DUNEDIN

PROJECT VALUE: \$20 million

COMPLETION: 2015



# Company CULTURE

At Octa we take seriously our role in determining and influencing the outcomes of the projects. Crucial to this delivery will be project structures, but the project environment that is generated where people are collaborating and working together toward delivery is an essential ingredient in the project mix.

Creating a positive project environment requires both a structural and disciplined working framework in order to achieve the desired client expectations, as well as ensuring that the project team culture and personalities are aligned to support the delivery.

## WORKING TOGETHER

Octa supports and values the development of collaborative working environments on projects, and seeks the active participation from all parties involved in the project in order to generate positive project structures. Octa operates freely from any formal allegiance with design consultant or construction contractor, and has worked successfully with the majority of the local design and construction companies. Our position as a specialist project management company allows us to operate independently and focus on the best interests of the project and committed to supporting the client.

Collaboration is an essential component of this role, and through our independence in the project team, Octa is best placed to influence collaboration and promote the development of strong professional relationships across parties. These relationships need to be focused on a long term approach, and be transparent so that the relative interests of the different organisations are understood, and all parties buy into the project direction and decisions.

# Unique SELLING POINTS

- **QUALITY ASSURANCE**

Octa has implemented and maintains certification for an internal Quality Assurance System. These quality management procedures provide a check that Octa's outputs, actions, information and advice are consistently of a high standard to clients and other team members. Our Quality System is certified to ISO/AS/NZS 9001:2008 and each Octa Associates office is audited annually by Telarc to ensure compliance and to maintain certification.

- **HEALTH AND SAFETY MANAGEMENT**

Octa operates a company 'Health and Safety Management System' on our projects. This system is structured to be auditable in order that performance can be measured across the project, and improvement opportunities can be managed across a number of concurrent projects.

This system provides Octa management and staff and other project stakeholders with the necessary guidance and procedures to ensure they understand the requirements of the Health and Safety in Employment Act and are able to comply with all statutory requirements which apply to the project.

Octa's role will be to promote and reinforce the safety culture throughout the construction phase and support the construction Contractor in achieving safety requirements through construction. The essential part of this culture will be in promoting the planning of work, including hazard inspections, and implementation of safety processes and equipment. While such planning processes typically are carried out, they require to be reinforced through site presence, auditing and the promotion and demonstration of a safety culture by project leaders at the senior level in order to embed through all levels of the project hierarchy.

All Octa personnel hold Site Safe qualifications, and a number have wider and more comprehensive training in the application of site safety procedures within the NZ Construction Industry.

Several of our senior Project Managers have engineering qualifications and this skill set is always of benefit to our clients when embarking on major infrastructure projects.

- **FINANCIAL CREDIBILITY**

Octa Associates has at all times since its formation in 1973 traded profitably and satisfies the solvency tests as defined in S4 of the Companies Act 1993. It makes a practice of holding substantial cash deposits with its bankers and has paid up capital/net assets of \$1,520,000. Octa Associates also carries substantial insurance as follows:

<b>Professional Indemnity</b>	<b>\$ 2,000,000</b>
<b>General Liability</b>	<b>\$10,000,000</b>
<b>Directors and Officers Liability</b>	<b>\$ 1,000,000</b>

- **TECHNICAL SKILLS**

Octa Project Managers are tertiary qualified with additional accreditation to a relevant professional institute (IPENZ, RICS) or project management credentials (PMP). Continued professional development of staff is on-going, and the company runs and in-house annual conference to focus on professional development.

- **INNOVATION**

Setting a positive project environment is also a key criterion for supporting innovation, and providing a platform where ideas and initiatives can be generated, assessed, and potentially incorporated where they are going to benefit the project. From our projects in similar environments we would consider promoting or accepting some consideration of items such as the following which will enable some innovation to be introduced into the delivery:

- A. Consideration of Whole of Life costs
- B. Value engineering
- C. Risk based approaches, including 'safety in Design' principles
- D. Assessment of delivery frameworks to allow staged delivery and early occupation of spaces
- E. Prototyping areas to enable the sign off of areas by end users
- F. Incorporating Environmentally Sustainable Design (ESD) principles into construction materials and methodology.

- **RELATIONSHIP AND ACCOUNT MANAGEMENT**

The common factors for the success of any project are linked to the quality of the relationship between the Project Manager and the Client. On a technical level we will build confidence and trust by developing a plan for delivery of the project which meets all client objectives using a technically competent team that will partner with Council staff to deliver the project. We will seek to understand each key stakeholder's expectations of the project plan and will implement a strategy to manage those expectations.

Octa's project management methodology is inclusive and consultative. From all internal levels of the client organisation to the external stakeholders comprising interest groups, neighbours, Territorial Authorities, Heritage New Zealand. Octa has a proven track record of consultation resulting in a range of solutions that have been successfully implemented. Octa recognises that the success of a project depends largely on the commitment of all people involved in the process and, therefore, encourages stakeholder participation and endorsement from commencement to completion.

The Octa Director assigned to a particular project will have a direct relationship with the Project Sponsor to enable regular, frank and open discussion on all project related matters. Issues can be brought to these discussions by any of the project team. When issues arise we endeavour to resolve them as close to the source as possible. Should escalation be required we rely upon the skills and experience of the Octa project team without escalating 'all the way up the food chain'.

# Project PROPOSAL

25 July 2016

## Proposed Fee Arrangement

We are confident that from our offices in both Dunedin and Auckland we can again provide a strong team to successfully deliver and assist with this project for «Client\_Name». Our proposed fee arrangements are as follows:

## Hourly Rates

David O'Malley - Project Director .....	\$185.00
Rhys Stickings - Lead Project Manager.....	\$140.00
Mike Randell - Seconded Project Manager.....	\$140.00

## Proposed Fees

- Planning.....\$1000 per month
- Organising .....\$1000 per month
- Monitoring .....\$1000 per month
- Updating.....\$1000 per month

**Total..... \$25,000 per month**

The above costs are GST exclusive. In terms of disbursements, we will invoice monthly to cover printing, communication, etc.

**TOTAL ESTIMATED COST**

**\$25,000.00 Monthly**



*Octa is the most experienced independent professional project management company in New Zealand.*

## Final COMMENTS

Octa is well suited to provide the required seconded services to «Client\_Name». We have proven project management systems, effective Health & Safety approach, and will provide skilled and experienced staff from both our Auckland and Dunedin offices to work with you effectively assist with your project.

# APPENDICES

**A. Staff Curriculum Vitae**

**B. Project Profiles**

**C. Standard Conditions of Engagement**



# OCTA

PROJECT MANAGEMENT

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DUNEDIN  
(03) 477 0145

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