**Semester**

Year

**Joslen Tardencilla**

Roof Restoration

08

**Fall**

Fall-2208-MAN2582-2113 / 2020

[ **Company will take care of all inspections, permissions, financial claims, and execution towards the homeowner’s roof restoration.**]

Joslen Tardencilla

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**Project Work Request (Business Case)**

|  |  |
| --- | --- |
| **Title of Project**: Home Roof restoration | **Request Date**: 7/15/2019 |
| **Requestor Name**:  Joslen Tardencilla | **Requesting Department**: Estimate Coordinator |
| **Requestor Phone**:  (305) 721 4826 | **(Office use) Request tracking number**: ST19204319 |

|  |  |
| --- | --- |
| **Business Need**:  Restoration towards 25 y/o roof. | |
| **Project Description:**  **Company will take care of all inspections, permissions, financial claims, and execution towards the homeowner’s roof restoration.** | |
| **Business Value** *(check all that apply)* | **Estimated Benefits** |
| ☐ Satisfy regulatory requirements | Installation is success and improves efficiency. |
| ☐ Increase revenue | Home value will increase due to restoration. |
| ☐ Improve Productivity | Home will have better resistance towards weather and natural disasters. |
| ☐ Increase retention | Leaks and poor insulation will be diminished, if not eliminated. |
| ☐ Support additional capacity | Shingles will appear newer; color will be more vibrant. |
| ☐ Improve competitiveness | Company will provide an affordable installation option that is hopefully covered by the homeowner’s insurance. |
| ☐ Decrease expenses | Company has Inspector when needed. |
| **Project Estimates (+/- 25%):**  1. Total cost:  2. Length of time: | 1. **Total: $20,000** 2. **Length of time: One month** |
| **Constraints: Working weather conditions. Materials not arriving on time. Unprecidented services required after planning and scope is completed.** | |
| **Assumptions: This project will be easy to execute, the claim department and the responsible party for the city permit will allow for a quick and affordable insurance coverage.** | |
| **High-level risks: The executing team becoming injured. No approval for a city permit. No coverage by an accredited insurance.** | |
|  |  |
| **Key Stakeholders: Client, suppliers, financial firm, community, site supervisor.** | Departments affected: Executing party. |
| Financial firm that deals with loans and insurance coverage. |
| The homeowner’s community. |
| The party responsible for supplies. |
|  |
| **Request Sponsor:** *(VP accountable for project)*  Sean Shapiro  CEO  Reliant Roofing, Inc  822 N. A1A Highway Suite 310  Ponte Vedra Beach, FL 32082 | **Sponsor signature** |
| **Requester’s Name: Joslen Tardencilla** | **Requester’s signature** |

**ROI ANALYSIS**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  | | --- | --- | | Investment Gain | **$12,454.61** | | ROI | **300.00%** | | Annualized ROI | **29,735,222.18%** | | Investment Length | 0.11 years | |

**Project Charter Project Serial Number:** ST19204319

|  |  |
| --- | --- |
| **Title of Project**: Roof Restoration. | **Start Date**: 7/15/2019  **Finish Date: 8/23/2019** |
| **Project Manager**: Sean Shapiro | **Total Cost (+/- 10%):**  16,606.14 |
| **ROI (+/- 10%): Roughly 35% of the total cost is used towards materials and services, the remaining 65% will be profitable towards the company and those responsible for this project.** | **Payback Point (+/- 10%): Normally, it takes the minimum of two week to distribute the profits towards Reliant Roofing Company.** |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Project Purpose or Justification**: This project will be made to restore the 25 y/o roof of a ground level home. | | | | | | | |
| **Measurable Project Objectives:**  **Estimate coordinator will provide a specific plan towards the materials and execution needed. Claim coordinator will negotiate the reasonable financial coverage for this project. Inspection will provide the ideal information for a city permit and to satisfy the project evaluation.** | | | | | | | |
| **High-Level Requirements:**  **It will be required that the financial coverage is acquired as quickly as possible. It will be required for the appropriate materials to be purchased and usable in time for the executing phase. It will also be required for frequent communication between the party executing to the project manager.** | | | | | | | |
| **Summary of Milestones: The milestones for this project will consist of six stages. The stages are: first inspection, a claim for financial coverage (the client has requested), a quote by the claim coordinator, materials are to be ordered and acquired, one day of execution and services (by a four-person crew and outside-hire personnel), and the final inspection.** | | | | | | | |
| **Deliverable** | | **Deadline** | | | | **Who is responsible** | |
| **Inspection** | | **7/18/19** | | | | **Reliant Roofing** | |
| **Financial coverage** | | **7/31/19** | | | | **Reliant Roofing** | |
| **Quote** | | **7/31/19** | | | | **Reliant Roofing** | |
| **Planning/ Materials** | | **8/5/19** | | | | **Reliant Roofing** | |
| **Execution** | | **8/22/19** | | | | **Reliant Roofing** | |
| **Inspection** | | **8/23/19** | | | | **Reliant Roofing** | |
| **Success Criteria (Sponsor Acceptance Criteria): The project will be successful if each stage is executed perfectly and without unplanned complications. The project should also meet the requirements to pass final inspection.** | | | | | | | |
| **High-level risks:** | | | | | | | |
| **Risk** | | | | **Mitigation Strategy** | | | |
| **Possibility of needing more materials than calculated.** | | | | **Purchase materials in bulk to have a little left over at the end of the project. The unused materials can be used for future projects.** | | | |
| **Bad weather on days of execution.** | | | | **Always pay attention to the forecast and plan some extra days in case of failure or emergencies.** | | | |
| **Injuries to the executing team** | | | | **Plan and rehearse the services needed, what strategies are appropriate, and what equipment is appropriate.** | | | |
| **Budget Summary:** The project’s budget is broken down to two slots for the materials purchased and shall not exceed the total of the excepted estimate of $80 unless there is a change order that has been approved by the Project Manager. | |  | | | |  | |
| **Budget Category** | | **Source** | | | | **Cost** | |
| **Taxes, insurance, permits & fees**  **(Bid Item) 1.00 EA @ 154.00 = 154.00** | | **Quality Inspection Department** | | | | **200.00** | |
| **Tear off, haul and dispose of comp. shingles**  **- 3 tab 33.77 SQ @ 47.23 = 1,594.96 3. 3 tab - 25 yr. - comp. shingle roofing - w/out felt 39.00 SQ @ 212.01 = 8,268.39 4. Roofing felt - 30 lb. 33.77 SQ @ 42.00 = 1,418.34 5. Re-nailing of roof sheathing - complete re-nail 3,377.00 SF @ 0.27 = 911.79** | | **Executing Team** | | | | **1000.00** | |
| **R&R Gable cornice return**  **- 3 tab 2.00 EA @ 94.31 = 188.62** | | **Executing Team** | | | | **200.00** | |
| **R&R Ridge cap**  **- composition shingles 164.00 LF @ 7.35 = 1,205.40** | | **Executing Team** | | | | **2000.00** | |
| **Asphalt starter**  **- universal starter course 198.00 LF @ 2.32 = 459.36** | | **Executing Team** | | | | **500.00** | |
| **R&R Valley metal**  **32.46 LF @ 6.22 = 201.90** | | **Executing Team** | | | | **250.00** | |
| **R&R Flashing**  **- pipe jack 3.00 EA @ 51.26 = 153.78** | | **Executing Team** | | | | **200.00** | |
| **Prime & paint roof vent 5.00 EA @ 27.07 = 135.35** | | **Executing Team** | | | | **200.00** | |
| **R&R Drip edge**  **237.72 LF @ 2.80 = 665.62** | | **Executing Team** | | | | **700.00** | |
| **R&R Roof vent**  **- off ridge type - 6' 2.00 EA @ 200.08 = 400.16 14. Seal & paint trim - two coats 237.72 LF @ 1.04 = 247.23** | | **Executing Team** | | | | **300.00** | |
| **Electrician**  **- per hour 2.00 HR @ 105.00 = 210.00 Labor hours to detach and reset the solar panel for the solar light located on the front slope/garage fascia. 16. R&R Flashing - rain diverter 1.00 EA @ 49.98 = 49.98 17. Digital satellite system - Detach & reset 1.00 EA @ 27.82 = 27.82** | | **Outside-Hire Service** | | | | **30.00** | |
| **Total:** | |  | | | | **5580.00** | |
|  | | | |  | | | |
| **Key Stakeholder List:** | | | | | | | |
| **Name** | **Role** | | **Position** | | **Contact Info** | | **MBTI Type** |
| **Hazel R.** | Sponsor | | **Homeowner** | | **Phone on file** | | **ISTJ** |
|  |  | |  | |  | |  |
| **Project Team Members** | | | | | | | |
| **Name** | **Role** | | **Position** | | **Contact Info** | | **MBTI Type** |
| **X** | **Champion** | | **Project Manager** | | **Phone and emal.** | | **INTJ** |
|  |  | |  | |  | |  |
| **Funding Sponsor:** *(VP accountable for project) X* | | | | **Sponsor Signature** | | | |

**Scope Statement Project Serial Number:** ST19204319

|  |  |
| --- | --- |
| **Title of Project**: Roofing restoration | **Start Date**: 7/15/2019  **Finish Date: 8/23/2019** |
| **Project Manager**: Sean Shapiro | **Total Cost (+/- 10%):**  16,606.14 |
| **ROI (+/- 10%): Roughly 35% of the total cost is used towards materials and services, the remaining 65% will be profitable towards the company and those responsible for this project.** | **Payback Point (+/- 10%): Normally, it takes the minimum of two week to distribute the profits towards Reliant Roofing Company.** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Description: Company will take care of all inspections, permissions, financial claims, and execution towards the homeowner’s roof restoration.** | | | |
| **Product Characteristics:** This project will allow multiple tasks to be completed at one time by supplying separate work areas for different tasks.   1. **Dispose: Tear off, haul and dispose of comp. shingles** 2. **Replace: re-nail 3,377.00 SF, R&R Gable cornice return, R&R Ridge cap - composition shingles 164.00 LF, Asphalt starter - universal starter course 198.00 LF, R907.5 Reinstallation of materials, R&R Roof vent - off ridge type - 6' 2.00 EA, R&R Flashing - rain diverter 1.00 EA.** | | | |
| **Product Scope:** The product scope for this project consists of two criteria. First, all completed work must be satisfactory and inspected. Second, financial coverage will be dealt with easily as discussed with homeowner. A detailed WBS will be provided to further outline any other requirements. | | | |
| **Product Milestones:** | | | |
| **Deliverable** | **Deadline** | | **Who is responsible** |
| **Statement that includes materials, services, and outside-hires needed to complete this project successfully.** | **7/31/19** | | **Reliant Roofing** |
| **Execution and completion of roof restoration.** | **8/22/19** | | **Reliant Roofing** |
| **Final Inspection. It is the responsibility of the project manager and an accredited inspector to issue an inspection to conclude weather the project was a success or a failure.** | **8/23/19** | | **Reliant Roofing** |
| **Project Limits and Exclusions: Services were included to total cost that were not stated in the initial statement. These services were revealed upon execution and cost the client more money than expected. The services not included in the scope are:**   1. **R&R Valley metal 32.46 LF @ 6.22 = 201.90** Valley metal was found to be installed as valley protection on the current roof system. 2012 IRC code requires valley protection. This item was not included on the original estimate. 2. **R&R Flashing - pipe jack 3.00 EA @ 51.26 = 153.78** There was a pipe jack found at the roof that was not included in the original estimate. In order to remove the shingles, the flashing will have to be pried and bent. As a result, the flashing will not sit flat and seal/shield against water intrusion and must be replaced - see 2012 IRC code language: 3. **Prime & paint roof vent 5.00 EA @ 27.07 = 135.35** The existing roof vents were found to be painted. Item not included on the original estimate.      1. **R&R Drip edge 237.72 LF @ 2.80 = 665.62** The drip edge will be damaged upon removal. It cannot be re-used and must be replaced. 2. **Seal & paint trim - two coats 237.72 LF @ 1.04 = 247.23** The existing drip edge was found to be painted. 3. **Electrician - per hour 2.00 HR @ 105.00 = 210.00 Labor hours to detach and reset the solar panel for the solar light located on the front slope/garage fascia.** 4. **Digital satellite system - Detach & reset 1.00 EA @ 27.82 = 27.82** There was a satellite dish installed at the roof that will need to be detached in order to perform the roof repair | | | |
| **Success Criteria (Sponsor Acceptance Criteria): The project will be successful if each stage is executed perfectly and without unplanned complications. The project should also meet the requirements to pass final inspection.** | | | |
|  | | | |
| **Project Administration Scope:** | | | |
| **Project Administration Milestones:** | | | |
| **Deliverable** | **Deadline** | | **Who is responsible** |
| **Completed Roof** | **8/23/19** | | **Reliant Roofing** |
| Project Charter | **8/5/19** | | **Reliant Roofing** |
| Project Management Plan | **8/5/19** | | **Reliant Roofing** |
| Scope Statement | **8/5/19** | | **Reliant Roofing** |
| WBS | **8/5/19** | | **Reliant Roofing** |
| Communication Plan | **8/5/19** | | **Reliant Roofing** |
|  | |  | |
| **PM: Sean Shapiro** | | **PM Signature** | |
| **Funding Sponsor:** *(VP accountable for project) X* | | **Sponsor Signature** | |

**Project Communication Plan Project Serial Number:** ST19204319

|  |  |
| --- | --- |
| **Title of Project**:Roof Restoration | **Start Date**:7/15/19  **Finish Date:8/23/19** |
| **Project Manager**: Sean Shapiro | **Total Cost (+/- 10%): 16,606.14** |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Project Role** | **Name** | **MBTI** | **Information Desired** | | **Method of Delivery** | **Timing or Frequency** | **Contact Information** |
| Sponsor | Ceo- Sean Shapiro | ISFJ | Budget approved for initial project scope and planning. | | Electronic email | Once | Phone, email, company address. |
| **Notes: N/A** | | | | | | | |
| **Project Role** | **Name** | **MBTI** | **Information Desired** | | **Method of Delivery** | **Timing or Frequency** | **Contact Information** |
| Champion | Manager responsible for restoration project- X | ISFJ | Manager is to document the project weekly. Manager is in charge of reporting all stages of planning, execution, and performance control to the company. | | Written reports given to the company. | Weekly | Phone and email. |
| **Notes: N/A** | | | | | | | |
| **Project Role** | **Name** | **MBTI** | **Information Desired** | | **Method of Delivery** | **Timing or Frequency** | **Contact Information** |
| Schedule Team Leader | Execution Foreman- X | ESFP | Foreman will report daily on days of execution. Report will state services completed, materials used, and parties responsible for services. | | Reports over the phone. | Daily | On sight presence to the restoration site, phone, email. |
| **Notes: N/A** | | | | | | | |
| **Project Role** | **Name** | **MBTI** | **Information Desired** | | **Method of Delivery** | **Timing or Frequency** | **Contact Information** |
| Budget Team Leader | Claim Coordinator- X | ESTFJ | Claim coordinator will check on the budget weekly and report back changes (if any). | | Emailed reports. | Weekly | Phone and email. |
| **Notes: N/A** | | | | | | | |
| **Project Role** | **Name** | **MBTI** | **Information Desired** | | **Method of Delivery** | **Timing or Frequency** | **Contact Information** |
| Quality Team Leader | Reliant Roofing Inspection- X  City permit inspection- X | INFJ | Inspectors wil report at beginning and upon completion. Inspectors will provide written reports and results on the progress needed for completion. Inspector will also provide a report to evaluate the project’s completion. | | Written reports given to the company. | Once at beginning and end of project. | Phone and email. |
| **Notes: N/A** | | | | | | | |
| **Project Role** | **Name** | **MBTI** | **Information Desired** | | **Method of Delivery** | **Timing or Frequency** | **Contact Information** |
| Team Member | Executing Member- X | INTJ | In person reports to the foreman. Report includes help for services, services being completed, materials being used, and injuries (if any). | | In person communication to with foreman in the site of restoration. | Daily | Phone numbers and addresses on file. |
| **Notes: N/A** | | | | | | | |
| **Funding Sponsor:** *(VP accountable for project) X* | | | | **Sponsor Signature** | | | |

**Quality Management Plan Project Serial Number:** ST19204319

|  |  |
| --- | --- |
| **Title of Project**: Roof Restoration | **Start Date**: 7/15/19  **Finish Date: 8/23/19** |
| **Project Manager**: Sean Shapiro | **Quality Team Leader: X** |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Project Description: Company will take care of all inspections, permissions, financial claims, and execution towards the homeowner’s roof restoration.** | | | | | | | |
| **Quality Objectives:**  **!. Initial inspection that defined scope and plan for the restoration project.**  **2. Frequent quality managing over scheduling, the stages of services, and the updates on how the planning and scope is holding up.**  **3. Inspector for city permit.**  **4. Final inspection to check on completion status.** | | | | | | | |
| **Project Quality Team Members:** | | | | | | | |
| **Name** | **Role** | | **Position** | | **Contact Info** | | **MBTI Type** |
| X | Quality Control Team Leader | | Work schedules and performance quality manager. | | Email and phone on file. | | ISTJ |
| X | Quality Improvement | | Leading personnel for executing team. | | Email and phone on file. | | ISTP |
| X | Internal Quality Control | | Inspector from Reliant Roofing Co. that documents the initial services needed for this restoration project. | | Email and phone on file. | | ESTP |
| X | External Quality Assurance | | Inspector from city permit department. | | Email and phone on file. | | ISTP |
| X | Process Quality Team Leader | | project quality metric and key performance indicator. | | Email and phone on file. | | ESTJ |
| **Quality Metrics Criteria (Sponsor Acceptance Criteria):** | | | | | | | |
|  | | | | | | | |
| **Project Quality Administration Deliverables:** | | | | | | | |
| **Deliverable** | | **Deadline** | | | | **Who is responsible** | |
| **Initial inspection** | | **7/18/19** | | | | **Reliant Roofing Quote Inspector** | |
| **City permit** | | **7/31/19** | | | | **Permit Department** | |
| **Final inspection that indicates completion.** | | **8/23/19** | | | | **Reliant Roofing Quote Inspector** | |
|  | | | |  | | | |
| **PM: Sean Shapiro** | | | | **PM Signature** | | | |
| **Funding Sponsor:** *(VP accountable for project)*  *X* | | | | **Sponsor Signature** | | | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Task Possibly at Risk (use WBS tasks with numbers) | Potential Damage ($) | Probability (%) | Cost of Risk  $ X % | Plan B | Plan C | Responsible for action |
| Foundation:  **R&R Valley metal**  **R&R Flashing - pipe jack** | **201.90**  **153.78** | 10% | 355.60 X 10% | Added cost: 2 X 355.60  Added time: 4 Hr. | Added cost:  Added time: | Executing Team |
| External:  **Prime & paint roof vent**  **R&R Drip edge** | **135.35**  **665.62** | 15% | 800.97 X 15% | Added cost: 2 X 800.97  Added time: 2 Hr. | Added cost:  Added time: | Executing Team |
| Internal:  Electrician - per hour | 2.00 HR @ 105.00 | 15% | 2.00 HR @ 105.00 X 15% | Added cost: Hire a second Electrician  Added time: 2 Hr. | Added cost:  Added time: | Outside-hire |

**Quantitive Risk Assessment and Management Plan Project Serial Number:** ST19204319

Deliverable Acceptance Form

Date

**Project Name: Roof Restoration**

**Deliverable Name: Roof Restoration 595 Dwelling**

**Project Manager: Sean Shapiro**

**Project Sponsor: Sean Shapiro**

(We), the undersigned, acknowledge and accept delivery of the work completed for this deliverable on behalf of our organization. My (Our) signature(s) attest(s) to my (our) agreement that this deliverable has been completed. No further work should be done on this deliverable. If the deliverable is not acceptable, reasons are stated and corrective actions are described.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Title** | **Signature** | **Date** |
| Joslen T. | Client |  | 8/23/19 |
| Sean S. | Project Manager |  | 8/23/19 |

1. Was this deliverable completed to your satisfaction? Yes X No \_\_\_

2. Please provide the main reasons for your satisfaction or dissatisfaction with this deliverable.

The “Roof Restoration” project is satisfactory because the structure has passed accredited inspections for unreliable insulation/leak prevention. The client is also satisfied with the physical appearance; shingle type and color paint match the client’s request.

3. If the deliverable is not acceptable, describe in detail what additional work must be done to complete it. N/A

Contact’s signature for resubmission of deliverable if found unacceptable: \_\_\_\_*\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

Lessons Learned Report

|  |
| --- |
| **Prepared by: Sean Shapiro** **Date:8/23/19**  **Project Name: Roof Restoration**  **Project Sponsor: Sean Shapiro**  **Project Manager: Sean Shapiro**  **Project Dates: 12 august 2020, 17 august 2020**  **Final Budget: 20,000$** |
| 1. Did the project meet scope, time, and cost goals?   Yes, this project has met the anticipated scope, time, and costs. Additionally, there were even materials left over after the project was completed by the anticipated date.   1. What was the success criteria listed in the project scope statement?   The project will be successful if each stage is executed perfectly and without unplanned complications. The project should also meet the requirements to hold weight and function as a safe pathway.   1. Reflect on whether or not you met the project success criteria.   This project flawlessly achieved the success criteria. The sponsor also accepted the criteria and its success. Each stage was executed on time. Even though there were unanticipated services not included within the original scope plan, the slight delay did not stop the original goal.   1. In terms of managing the project, what were the main lessons your team learned?   My team learned to quickly adapt to unprecedented services needed.   1. Describe one example of what went right on this project.   The disposal and replacement during the executing phase were completed within the time margins planned.   1. Describe one example of what went wrong on this project.   During the executing phase, unanticipated services were required. A short delay within the executing phase was the result of this.   1. What will you do differently on the next project based on your experience working on this project?   Next time, the initial inspection should document the restoring area in its entirety. Vents, piping, edges, and trim included |

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (signature)

Project Participant

RACI Chart

Graphical user interface, application, table, Excel

Description automatically generated

Deliverables Schedual (As required by “Assignment 9 Course Project Book)

Graphical user interface, application

Description automatically generated