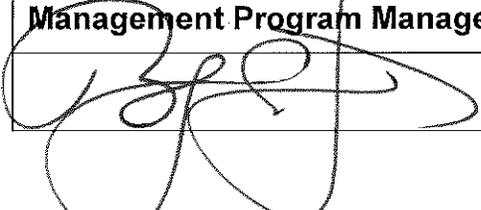


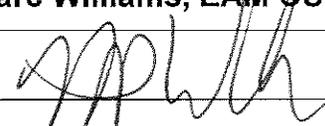
# **Enterprise Asset Management**

## **Planning and Construction Management Program**

### **Service Level Agreement (SLA)**

# Approved by:

<i>DAS (Name &amp; Title)</i>	<i>Date</i>
<b>Barry Jones, Planning &amp; Construction Management Program Manager</b>	
	11-10-15

<i>Customer Utility Board</i>	<i>Date</i>
<b>Marc Williams, EAM CUB Chair</b>	
	10/14/15

# Changes:

<i>Date</i>	<i>Draft Version</i>	<i>DAS Staff Representatives</i>	<i>Customer Representatives</i>	<i>Description of changes</i>
9/11/2014	1.0	Barry Jones, Planning and Construction Management Program Manager	Marc Williams, EAM CUB Chair	First Version of SLA document approved by the EAM CUB
10/14/2015	1.1	Barry Jones, Planning and Construction Management Program Manager	Marc Williams, EAM CUB Chair	<ul style="list-style-type: none"> <li>• Delete measures #1 and #5</li> <li>• Delete Interior Design Catalogs</li> <li>• Replace Measures #4, #8 and #9</li> </ul>

# SERVICE LEVEL AGREEMENT (SLA) TABLE OF CONTENTS (TOC)

<b>1. Introduction.....</b>	<b>4</b>
1.1. Background .....	4
1.2. Objectives and purpose of SLA.....	4
1.3. Identification of DAS P&CM (Planning & Construction Management) .....	5
<b>2. Service Catalog.....</b>	<b>6</b>
2.1. List of services provided by DAS P&CM Program.....	7
<b>3. Service Level Expectations.....</b>	<b>7</b>
3.1. Performance metrics.....	7
3.2. Service levels/ performance targets.....	8
<b>4. Financial Processes .....</b>	<b>10</b>
4.1. Billing.....	10
4.2. Billing disputes.....	10
4.3. Payment .....	10
<b>5. Service Management Processes.....</b>	<b>10</b>
5.1. Performance measurement and reporting.....	10
5.2. SLA review and amendment.....	12
5.3. Incident management .....	13
5.4. Complaint resolution and remediation.....	14
<b>6. Glossary: Acronyms &amp; Definitions.....</b>	<b>15</b>
6.1. Acronyms .....	15
6.2. Definitions.....	16
<b>7. Contact Data.....</b>	<b>18</b>
<b>8. Appendixes .....</b>	<b>19</b>
8.1. Service Catalog Sheets .....	19
8.2. SLA performance measure data dictionary .....	23
8.3. Rate methodologies.....	30

## **1. Introduction**

### **1.1. Background**

The Department of Administrative Services has four Service Enterprises, each governed by a Customer Utility Board (CUB). Each CUB acts as a governing board for the services provided by the associated Service Enterprise that have been designated as utility services.

The CUB's have four primary responsibilities:

- a) Approving general service level agreements.
- b) Approving rate-setting methodologies and resulting rates.
- c) Reviewing business plans and annual financial statements.
- d) Settling unresolved service complaints.

One of the key responsibilities assigned to CUB's is the approval of Service Level Agreement (SLA) documents. CUB's are responsible for reviewing and approving the content of these documents, ensuring the defined service levels are commensurate with the rates charged for each service.

CUB's are also responsible for approving the process to be followed for the development, approval and amendment of SLA documents. They assign members to specific workgroups created to conduct and oversee this work, and ensure participating representatives from customer agencies can clearly articulate the needs of the customers.

### **1.2. Objectives and purpose of SLA**

The objective of this Service Level Agreement document is to ensure both DAS Planning & Construction Management (P&CM) Program staff and customers understand and agree how the services will be performed and the responsibilities and expectations of each party.

The SLA will:

- a) Describe the services provided by DAS P&CM.
- b) Identify service level objectives and performance targets for the services, agreed upon between DAS P&CM and customers.
- c) Identify responsibilities of each party.
- d) Document the following service management processes agreed upon between DAS and customer representatives from all four CUB's:
  1. Performance tracking and reporting to customers.
  2. Review and amendment of the SLA document.
  3. Service-related dispute resolution.

This SLA document is not meant to be static, but a working document that will reflect the continuous change in services delivered by DAS, service delivery operating processes, and service level expectations agreed between DAS P&CM and customers.

### 1.3. Identification of DAS P&CM (Planning & Construction Management)

#### 1.3.1. Short description of DAS P&CM's Program/ mission

DAS Enterprise Asset Management Division manages capital construction and capital improvement projects for its facilities as well as for other agency facilities. New construction, major renovations or improvements to building structures and systems are part of the DAS's Capital Improvement and Capital Construction budget requests. Our Project Managers direct construction of new facilities and remodeling of existing ones for state agencies. We also assist agencies in obtaining project management services through outside consultants when appropriate. This mix of in-house and qualified private sector contract services yield the best results for our customers.

DAS Project Managers ensure that the design and construction of each project meets the quality requirements set by the State, other involved agencies, and that they meet the code requirements. We regularly compare our costs and performance against private and public sector benchmarks to assure the highest quality service. When requested, the Division also manages projects for other agencies' facilities at cost, as staff is available. We also provide space planning services to improve work space. We provide quality design services to our customers to facilitate the efficient use of State-owned and leased office space.

#### 1.3.2. Applicable statutes, rules and policies

Statute, Rule or Policy	Summary
Agency Service and Technical Service Projects : 125-6-220	<ul style="list-style-type: none"> <li>• To establish procedures for providing assistance and management services to state agencies for consultant selection, construction planning, architectural and engineering support, construction project management and real estate services.</li> <li>• <a href="http://www.oregon.gov/DAS/EAM/docs/1256220.pdf">http://www.oregon.gov/DAS/EAM/docs/1256220.pdf</a></li> </ul>
Building Signage : 125-6-225	<ul style="list-style-type: none"> <li>• This policy is for consistent management of names of buildings on the Capitol Mall and of all Department of Administrative Services buildings for public convenience and clarity.</li> <li>• <a href="http://www.oregon.gov/DAS/EAM/docs/1256225.pdf">http://www.oregon.gov/DAS/EAM/docs/1256225.pdf</a></li> </ul>
Project Authorization Procedures for Office Space Remodeling Projects : 125-6-210	<ul style="list-style-type: none"> <li>• DAS will authorize a tenant agency to remodel space at the agency's expense to meet its unique program needs.</li> <li>• However, cumulative remodeling in DAS owned or</li> </ul>

	<p>operated buildings must not damage, overtax, or impair building surfaces, structures, or systems; violate codes or endanger occupants; or result in unplanned costs of installation, maintenance, or operations.</p> <ul style="list-style-type: none"> <li>• <a href="http://www.oregon.gov/DAS/EAM/docs/1256210.pdf">http://www.oregon.gov/DAS/EAM/docs/1256210.pdf</a></li> </ul>
<p>Technical Standards for Remodeling and Modifications : 125-6-211</p>	<ul style="list-style-type: none"> <li>• Modifications to DAS owned or operated buildings must support building surfaces, structures, and systems; conform to codes and be safe for occupants. They must be cost effective in design, construction, installation, maintenance, and operation. For those reasons, DAS maintains and requires conformance to Technical Standards that exceed state and local minimum codes.</li> <li>• <a href="http://www.oregon.gov/DAS/EAM/docs/1256211.pdf">http://www.oregon.gov/DAS/EAM/docs/1256211.pdf</a></li> </ul>

## 2. Service Catalog

The Service Catalog lists and describes the main services DAS P&CM provides to its customers. The following criteria were considered in order to identify and describe the services included in the Service Catalog:

- The intent of the Service Catalog is to identify and describe services **from the customer's point of view**. This helps to emphasize and explain the **benefits, outcomes and deliverables that the customers receive** when purchasing a service, as opposed to describing the whole set of internal support processes and activities executed by P&CM staff in order to deliver these services. As a result, business support processes and functions, such as account management or helpdesk functions, are not meant to be systematically captured or thoroughly explained in this Service Catalog.
- The services included in this Service Catalog are those **available to DAS P&CM customers today**. Service descriptions reflect the different features and options currently available to P&CM customers, enabling customers and P&CM staff to know what to expect and not expect from a service. Clearly defined services inform customers about service offerings, including what each service does and does not include, service boundaries, how to request services, and how to get help, as well as other factors influencing the extent to which they can be currently enjoyed by DAS P&CM customers. Consequently, all narrative about future service features and offerings has been purposefully removed from the description of services included in this Service Catalog.
- In order to identify and describe services with the right level of detail, consideration has been given to describing **services or offerings that can be purchased in stand-alone mode**. If a given service needs to be purchased as part of a packaged offering, the package will be described in its own Service Catalog sheet and the individual service will be described in the "What's included" section of the packaged offering's Service Catalog sheet.

- The purpose of the Service Catalog is to describe the **standard services and terms of service delivery**, not the exceptional services or service terms that can be offered to a given customer under special circumstances.

## 2.1. List of services provided by DAS P&CM Program

A brief description of each service is included in the section below. For detailed descriptions about the services available to DAS P&CM customers, consult the Service Catalog sheets in appendix 8.1 of this SLA document.

Service	Summary
<p><b>1. Construction Management – Planning and Feasibility</b></p>	<p>Planning and feasibility within Construction Management provides project planning and preconstruction services for new government construction, building renovation, and building systems upgrades. This includes the review and approval of the work for any consultants and contractors hired in this phase. The project goals and scope are finalized and documented. An initial feasibility study can be done in order for the client to determine the projects viability. A project budget is also developed as part of this service.</p> <p>Another important service within planning and feasibility that can be provided is the development of presentation materials for the project, facilitating discussion of funding options, and project funding approval.</p>
<p><b>2. Construction Management - Execution</b></p>	<p>Execution within Construction Management provides the project management of the construction project. This includes resource management and contract management. In this service we monitor, identify, and mitigate any project risks.</p> <p>Ongoing project updates including timeline and budget changes are part of this service.</p>

## 3. Service Level Expectations

### 3.1. Performance metrics

This subsection includes a list of metrics that will be used to track quality of service delivery along different quality attributes/ dimensions.

These metrics are agreed upon by DAS P&CM and customer representatives and approved by the EAM Customer Utility Board.

- 1) **Quality of completed plans that meet the customer needs:** Average rating of question "How well did the completed plans meet your needs?" on a scale of 1 of 5.
- 2) **Quality of completed projects that meet the customer needs:** Average rating of question "How well did the completed project meet your needs?" on a scale of 1 of 5.
- 3) **Timely response to project requests:** Percent of projects for which a decision on project approval/denial (or deferred decision) has been communicated to requesting agency within 8 calendar days from submission of request.
- 4) **Project delivered by agreed upon date:** Percentage of time the project was completed by the initial agreed upon date between the customer and DAS P&CM.
- 5) **Timely Communication:** Average rating of question "how well did the communication throughout the project / process meet your needs?" on a 1-5 scale.
- 6) **Hours predicted for Execution:** Hours predicted vs hours tracked on project. Target based on +/- percentage of planned hours.
- 7) **Actual Expenditures Compared to Projected (Budgeted):** Percentage of times projects are completed within the budget initially agreed upon between customers and DAS P&CM.

For detailed description about these performance metrics, consult the SLA measure dictionary sheets in appendix 8.2 of this SLA document.

### 3.2. Service levels/ performance targets

Metric Number	Metric	Metric explanation	Target
1	<b>Quality of completed plans that meet the customer needs</b>	Average rating of question "How well did the completed plans meet your needs?" on a scale of 1 of 5.	Agreement to measure and set target at CUB when 6 -9 months' worth of data are available
2	<b>Quality of completed projects that meet the customer needs</b>	Average rating of question "How well did the completed project meet your needs?" on a scale of 1 of 5.	Agreement to measure and set target at CUB when 6 -9 months' worth of data are available
3	<b>Time to respond to Project requests</b>	Percent of projects for which a decision on project approval/denial (or deferred decision) has been communicated to requesting agency within 8 calendar days from submission of request.	85%

4	<b>Project delivered by agreed upon date</b>	Percentage of time the project was completed by the initial agreed upon date between the customer and DAS P&CM.	<b>90%</b>
5	<b>Timely Communication Throughout Process</b>	Average rating of question "How well did the communication throughout the process meet your needs?" on a scale of 1 of 5.	Agreement to measure and set target at CUB when 6 -9 months' worth of data are available
6	<b>Hours predicted for Execution</b>	Hours predicted vs hours tracked on project. Target based on +/- percentage of planned hours.	<b>90% to 110% (+/- 10% from 100%)</b>
7	<b>Actual Expenditures Compared to Projected (Budgeted)</b>	Percentage of times projects are completed within the budget the initially agreed upon between customers and DAS P&CM.	<b>87%</b>

For detailed description about these performance metrics or service levels/ performance targets, consult the SLA measure dictionary sheets in appendix 8.2 of this SLA document.

## **4. Financial Processes**

### **4.1. Billing**

Customer shall pay DAS P&CM for the services provided. These charges will be billed on a monthly basis.

### **4.2. Billing disputes**

Customers must notify the DAS P&CM P&C Manager, in writing or email at [PCM.support@oregon.gov](mailto:PCM.support@oregon.gov) of the disputed billing amount and the reason for the dispute within 30 days of the dated invoice.

Any amount disputed in good faith, may be deducted from the invoice, as long as the written notice has been sent to the DAS P&CM Manager.

The remaining undisputed amount must be paid by the original due date. Within 30 days after final resolution of the disputed charges, all disputed amounts must be paid by the customer.

### **4.3. Payment**

Service charges are due and payable thirty (30) days from receipt of invoice.

## **5. Service Management Processes**

### **5.1. Performance measurement and reporting**

DAS P&CM will be responsible for measuring service performance, as well as for reporting on compliance within the agreed SLE's or performance targets.

At a minimum DAS P&CM will develop and publish quarterly and annual performance reports as described below:

#### **5.1.1. Quarterly reports**

Quarterly reports will track the performance target and the actual performance for each measure identified in the SLA document. They will be posted electronically on DAS P&CM website for all customers to review.

At a minimum, these reports will include the following information:

- 1. A comparison of actual performance results versus performance targets for the current period and at least the two previous periods.**

Quarterly reports can include other tables or graphs with additional views or analysis of performance along other dimensions relevant to DAS P&CM. This may include a breakdown of performance results per geographic area, per customer group or per type or subtype of triggering event.

2. **A proposed action plan for each measure not in compliance with the agreed service level expectations or performance targets.**

An action plan will include:

- a. An analysis / statement of the **root causes/reasons** for not meeting the service level target(s).
- b. A description of **corrective actions identified and recommended** by the service provider in order to meet the agreed service level(s).
- c. A **timeframe** for the implementation of the corrective actions.

A measure will be considered not in compliance with the agreed performance target if either one of the following scenarios applies:

- a. If the SLE is measured monthly, when the performance is below target level for two consecutive months.
- b. If the SLE is measured quarterly, when the performance below target level in any given quarter.

3. **A report on customer-specific formal performance complaints received by DAS P&CM over the previous quarter.** This report will:

- a. Identify number of complaints received by type.
- b. Describe each complaint/ performance incident and the affected customer(s).

In addition to being posted on DAS P&CM website, quarterly performance reports will be delivered to the members of the EAM CUB. DAS P&CM will be present at the Customer Utility Board meeting every quarter to present the report for CUB members to review the last quarter's performance report and to present and receive feedback on the corrective action plans for the measures where performance is not in compliance with the agreed targets.

### **5.1.2. Annual performance reports**

DAS P&CM will develop and deliver a draft annual performance report, analyzing actual performance results achieved and corrective actions implemented during the previous year for each measure identified in the SLA document.

Based on the information shown on the draft annual performance report, members of the EAM CUB will have an option to review and provide feedback on any corrective actions recommended by DAS P&CM to address non-compliance with performance targets, as well as to **monitor the implementation of the action plans agreed upon** with DAS P&CM throughout the previous twelve months for the measures that did not show compliance with the established performance targets.

The annual performance report will include:

1. The same information as the quarterly performance reports for the performance of each measure identified in the SLA document over the last quarter of the year.
2. An additional section with follow up information about the corrective actions implemented and the results achieved for the measures where performance was not in compliance with the agreed SLE's in any given quarter within the year.

CUB members will use this Annual Report to conduct a yearly performance review, which will be deeper and broader than the regular performance reviews conducted every quarter between the CUB and DAS P&CM. The recommendations and feedback provided by the CUB will be

incorporated by DAS P&CM into a final version of the annual performance report. The annual performance review process could lead to a review and/or amendment of the SLA document agreed between DAS P&CM and its customers. The final report will be posted electronically on DAS P&CM website.

## **5.2. SLA review and amendment**

This Service Level Agreement is a living document, capable of being updated and amended over time with the agreement of both parties.

### **5.2.1. Ongoing SLA review.**

**SLA document reviews or amendments** will be considered as a result of any of the following:

1. A new service or a service enhancement is incorporated into DAS P&CM's Service catalog, allowing for new associated SLE's to be developed and added to the SLA document
2. Changes in DAS P&CM's ability to perform as a result of:
  - a. Significant and sustained change in workload demands.
  - b. A significant and sustained increase or reduction in DAS P&CM resources.
  - c. A need to conform to other unforeseen organizational constraints within DAS or within state government.
3. When customer's expectations and/or performance service level needs have changed.
4. Evolution in DAS P&CM tools and processes, which allow for better metrics and/or evolved performance level targets.
5. Missing performance targets by 15% (whether actual performance is over or under the target) in more than 2 consecutive quarters.
6. When DAS P&CM's corrective action recommends a reassessment in the performance targets agreed for a service.

The **SLA amendment process** will be as follows:

1. The request to review and modify the SLA document can be initiated by DAS P&CM or any customer represented at the CUB.
2. Based on the nature or scope of the SLA modification request, the CUB and DAS P&CM may undertake the modification and approval of the amended SLA document in the course of a regular CUB meeting or choose to create a SLA review team/workgroup for this purpose.
3. If an SLA review team is created, the workgroup will review and draft the recommended changes/updates to the content of the SLA document.
4. The draft amended SLA document will be submitted to the CUB for review and approval.

### **5.2.2. Biennial SLA review.**

**The Service Level Agreement will be reviewed** at least **once per biennium** to ensure service levels are adjusted and remain both appropriate for the services DAS P&CM delivers and commensurate with the rates charged for each service.

The **biennial SLA review** will be as follows:

1. The CUB and DAS P&CM will designate a SLA review team consisting of customer and DAS P&CM representatives. Customer representation will include at a minimum a member from the CUB.
2. The SLA review team will conduct an analysis and evaluation of the SLA agreement and identify any potential amendments to the SLA document. To do so, the SLA review team will:
  - a. Conduct an analysis of the SLE's against the actual performance results achieved in the last two years, identifying opportunities and/or needs to readjust service level expectations or performance targets.
  - b. Conduct a review of previous and potential performance issues that may affect services.
  - c. Conduct an evaluation of the success in the adoption, acceptance and commitment to the SLA by both parties:
    - i. How successful has the SLA been - has it made a difference?
    - ii. Has it been used by DAS P&CM staff, and if not, why?
    - iii. Have customers used it or adhered to it, and if not, why?
    - iv. Has it helped manage customers' expectations?
    - v. What barriers/problems have there been and what other feedback has the service provider received?
3. The SLA team will review and make recommended changes/updates to the content of the SLA document
4. The draft amended SLA document will be submitted to the CUB for review and approval.

### **5.3. Incident management.**

DAS P&CM has developed the following incident response process in order to support the prompt and satisfactory resolution of service incidents.

- In the event of a performance issue, failure to meet commitments, or if a customer has concerns with the level of services received, the customer agency may report the problem by either one of these methods:
  - Calling DAS P&CM at 503-373-7169
  - Sending an email to [PCM.support@oregon.gov](mailto:PCM.support@oregon.gov)
- When reporting an incident, the customer agency will need to provide a brief description of the problem, informing about the urgency of the issue.
- DAS P&CM will categorize all reported incidents and forward to the appropriate staff member for resolution.
- The assigned staff member will contact the customer within twenty-four (24) hours from receipt of the incident.
- If the incident is not resolved or the staff member is not available the customer will be contacted by the Program Manager
- If necessary, the incident will be escalated to the Division Administrator.

## 5.4. Complaint resolution and remediation

### 5.4.1. Principles

Performance complaints should be addressed and resolved at the lowest common level, collaboratively between the customer and representatives of DAS P&CM.

If performance is below customer's expectations, an informal approach often offers the quickest solution. If circumstances permit, DAS customers should talk with the DAS employee or unit involved in the situation to seek resolution to any performance dispute—explain the problem and ask for assistance. If this informal approach does not resolve the issue, or if at any given time DAS customers are not satisfied with the levels of utility services received, they may submit a formal performance complaint to DAS P&CM via the formal complaint intake process described below.

Resolution of formal performance complaints raised by individual customers will be done in accordance with the following principles:

1. All complaints submitted using the process outlined below in 5.4.2 will be considered formal, and they will be logged, documented and published by the service provider.
2. Formal performance complaints shall only be considered resolved when:
  - a. DAS P&CM and the affected customer (s) **have agreed on an action plan to solve/ correct the problem;** and
  - b. **Applicable remedies** to compensate and/or exact reparation to the affected customer (s) **have been agreed** to the satisfaction of both parties.
3. In the event a customer is not satisfied with either the action plan or the remedies offered by DAS P&CM, complaints can be escalated by the customer to the next level in the escalation path within DAS for resolution.

### 5.4.2. Raising and recording formal complaints

Performance complaints will be submitted to DAS P&CM via [PCM.Complaints@oregon.gov](mailto:PCM.Complaints@oregon.gov), a complaint intake email inbox specifically established for this purpose. All complaints submitted via this process will be considered formal complaints.

Formal complaints should include:

1. A summary description of the complaint. This description may include a customer's desired resolution of the matter.
2. Identification of affected customer (s).
3. If applicable, a description of aggravating circumstances (incident severity, repeated problems, estimated financial loss incurred or savings not materialized by the customer as a result of the performance incident, etc.)

All formal complaints received will be documented in a DAS P&CM's complaints log file, and responsibility will be assigned to staff within DAS P&CM to follow up and seek resolution.

The information in the complaints log file will be used to develop the customer-specific formal performance complaints report that will be published as part of DAS P&CM's quarterly performance report.

### 5.4.3. Complaint escalation process

In the first instance complaints will be assigned to a supervisor of the functional unit affected by the complaint. After investigation and consultation with the staff involved, the supervisor will seek resolution by offering to the complainant both:

1. **An action plan to solve/ correct the problem**, which at a minimum will consist of:
  - a. A description of corrective actions identified and recommended by the service provider to solve/ correct the problem.
  - b. A timeframe for the implementation of the corrective actions.
2. **Applicable remedies** to compensate and/ or exact reparation to the affected customer.

A customer who has not obtained satisfactory resolution to their formal complaint can escalate the dispute to the next level in the escalation path within DAS, until an action plan and appropriate remedial measures to solve the performance issue are agreed to the satisfaction of both customer and DAS representatives. At each step in the escalation process, the customer needs to describe why the prior proposal by DAS was not satisfactory. The steps in the escalation path after seeking resolution with the unit directly involved in the problem are the following:

- DAS P&CM Manager, 503-373-7211. If unresolved, escalate to
- EAM Administrator, 503-378-5093. If unresolved, escalate to
- Deputy Director of DAS. If unresolved, escalate to
- EAM Customer Utility Board.

At the end of the escalation process, the CUB will provide a last resort resolution forum to discuss and settle unresolved performance complaints.

### 5.4.4. Remedies

As part of resolving performance complaints, the following remedial actions can be offered to the complainant by DAS P&CM:

1. A clear explanation for the performance incident will be offered in all instances to any customer raising a complaint.
2. A credit / discount on the service charges corresponding to the period when the performance incident occurred may be awarded in appropriate circumstances (based on aggravating factors such as incident severity, financial losses incurred by the customer as a result of the performance issue, etc.).
3. A customer may be granted the ability to change providers for a specific service. This remedial measure will be reserved for exceptional circumstances in which resolution of a customer-specific performance issue has proved historically elusive, combining severe in-compliance with agreed SLE's or performance targets and repeated failure to implement corrective actions agreed between DAS and customer to fix the underlying performance problem.

## 6. Glossary: Acronyms & Definitions

### 6.1. Acronyms

- **CUB:** Customer Utility Board.
- **DAS:** Department of Administrative Services.

- **FAQ:** Frequently Asked Questions.
- **FTE:** Full-Time Equivalent.
- **EAM:** Enterprise Asset Management.
- **EGS:** Enterprise Goods and Services.
- **EM:** Entrepreneurial Management.
- **EHR:** Enterprise Human Resource Services.
- **ETS:** Enterprise Technology Services.
- **IPM:** Interior Project Manager
- **PA:** Project Authorization
- **P&CM:** Planning & Construction management (a Program within DAS/EAM)
- **PM:** Project Manager
- **SA:** Service Agreement.
- **SFMA:** Statewide Financial Management Application.
- **SLA:** Service Level Agreement.
- **SLE:** Service Level Expectation.

## 6.2. Definitions

- **Billing Dispute:** A customer billing dispute is any alleged inaccuracy, omission or error in relation to a service charge or reflected on a service bill.
- **Complaint (a.k.a. Performance or Service Complaint):** A formal expression of dissatisfaction with the quality of service received by a customer.

Formal complaints will be those raised by customers using a complaint intake email inbox or through other electronic means. Each service provider within DAS will set up a dedicated email inbox or other electronic means (web forms, etc.) specifically established for this purpose.

A formal complaint can be motivated by one or many unresolved service incidents, an unresolved billing dispute or, generally speaking, by any perceived lack in the quality of operations or in the quality of services received by a customer.

- **Entrepreneurial Management:** Innovative public management model that uses customer choice, competition, and policy/service separation to increase service satisfaction.
- **Full Time Equivalent:** This is the number of working hours that represents one full-time employee during a fixed time period, such as one month or one year.
- **Incident (a.k.a. Performance or Service incident):** Any event which is not part of the standard operation of a service which causes, or may cause, an interruption to, or a reduction in, the quality of that service. A service incident can be communicated by a customer or can be detected by the service provider.
- **Incident Management:** Process for dealing with service incidents and restoring normal service operation as quickly as possible, minimizing the adverse impact on business operations.

- **Rate (Service rate):** A price that incorporates the costs of delivering the service at the service levels agreed to by both parties.
- **Remediation (a.k.a. Remedies or Remedial actions/ measures):** In the event of a formal complaint raised by a customer, remediation refers to the list of actions/ measures DAS or any of its service delivery units can take or offer to compensate and/or exact reparation to the affected customer(s) above and beyond agreeing on an action plan to correct the underlying service problem.
- **Service:** A bundle of activities and resources (processes, people and IT resources) combined to provide a clear business outcome or output/ deliverable received by the customer.
- **Service Agreement:** A document, signed by service provider and a single customer, reflecting customer-specific information such as choice of services from service catalog, specific operational procedures between the parties, or contact information for critical information systems or processes, etc.
- **Service Catalog:** A description of the services and service offerings provided by a service provider. This can be a multi-level set of information with linked and discrete hierarchies of services, child services and specific 'offerings' (specific tasks) available for these services, and will typically describe service terms, standards, packages (if available), exclusions (if applicable), etc.
- **Service Level Agreement (SLA):** A document, specific per service provider, which includes the following core elements: (1) A service catalog; (2) A set of agreed SLE's (performance targets); (3) A statement of responsibilities of service provider and customers; and (4) A description of key service management processes. All of these elements help improve service delivery, manage expectations, clarify responsibilities and facilitate communication between the service provider and its customer base.
- **Service Level Expectation (SLE):** Written, measureable target for a service or a process performance agreed between service provider and customers.
  - a. For any given service with an SLE, service performance targets will be common to all customers (concept of utility services).
  - b. If a service offering includes different packages/ levels of service, different packages of the same service can have different performance targets but these will be common to all customers of the same package/ level of service.
- **Statewide Financial Management Application:** This is the accounting IT system in use by most state agencies of Oregon state government.
- **Utility Service:** DAS Utility services are those most efficiently provided through DAS in order to maximize efficiency or capture economies of scale—where it makes economic sense to have a single supplier for all users for any of the following reasons: economies of scale; policy reasons; the need for one integrated system; or a strong need for uniformity.

Customers of utility services are local government entities, individual state agencies and other public entities that may choose how much to purchase, but for any of the reasons cited above the choice of supplier is limited to a single designated source.

## 7. Contact Data

Specialty Area	Contact Name	Contact Information
Manager P&CM	Barry Jones	<a href="mailto:barry.jones@oregon.gov">barry.jones@oregon.gov</a> (503)373-7211
P&CM Administration	Nora Leahy	<a href="mailto:nora.leahy@oregon.gov">nora.leahy@oregon.gov</a> (503)373-7169
Construction Project Management	Nick Larson	<a href="mailto:nicholas.c.larson@oregon.gov">nicholas.c.larson@oregon.gov</a> (503)373-7196
P&CM Accounting	Jeff Whittaker	<a href="mailto:jeffrey.whittaker@oregon.gov">jeffrey.whittaker@oregon.gov</a> (503)373-7101

## 8. Appendixes

### 8.1. Service Catalog Sheets

1- Construction Management – Planning and Feasibility	
1. What is the service?	Description
a. Service Summary	<p>Planning and feasibility within Construction Management provides project planning and preconstruction services for new government construction, building renovation, and building systems upgrade. This includes the review and approval of the work for any consultants and contractors hired in this phase. The project goals and scope are finalized and documented. An initial feasibility study can be done in order for the client to determine the projects viability. A project budget is also developed as part of this service.</p> <p>Another important service within planning and feasibility that can be provided is the development of presentation materials for the project, facilitating discussion of funding options, and project funding approval.</p>
b. What is included?	<p><b>General Consultation</b></p> <p><b>Establish initial project goals</b>-meet with customer to identify and document the customer's needs and ultimate goal. Including energy studies and certifications</p> <p><b>Scope development</b>-create clear and complete project scope</p> <p><b>Planning</b>-develop a plan for the most efficient and least disruptive method of completing the project. This includes possibility for phasing projects.</p> <p><b>Cost estimating</b>-provide estimates of construction projects budgets</p> <p><b>Soliciting contract</b>-provide the services for necessary contracts for the planning and feasibility. This generally would be for Architects and/or Engineers.</p> <p><b>Provide a baseline for progress measurement and project control</b></p> <p><b>Establish project financing</b>-identify finance options for a project</p> <p><b>Project Schedule</b>-create project timeline with key deliverables and milestones.</p>
c. What is not included in the service?	<p>We do not disseminate information to our customer's staff. Therefore, an agency contact will be provided by the customer to be the project point of contact and disseminator of information to the customer's staff. We cannot fulfill the role of the agency contact.</p>
d. Offerings and options	<p>These services would need to be provided together.</p> <p>A rough project budget estimate can be provided with sufficient information.</p> <p>Development of presentation packages for approval and funding for project.</p>
e. Service prerequisites	<p>Clear understanding of the customers' needs, goals, and project timeline.</p>

<p>f. (Service-specific) Customer and provider responsibilities</p>	<p><b>Planning and Construction Management responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Prepare a written budget estimate</li> <li>• Develop and present a project schedule estimate</li> <li>• Develop and present a project scope</li> <li>• Develop and present a project objectives</li> <li>• Develop and present a presentation documents</li> <li>• Develop and present a list of project risks</li> </ul> <p><b>Customer responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Agency timeline for project</li> <li>• Goals of the project</li> <li>• Budget limitations</li> <li>• Agency specific needs</li> <li>• Agency risks - identification of the agency specific risks</li> <li>• Statement of work</li> <li>• Determine security needs</li> <li>• Appoint an agency contact designee</li> </ul>
<p><b>2. How is the service requested?</b></p>	<p><b>Description</b></p>
<p>a. How is this service requested?</p>	<p>Through a Project Authorization (PA) request. Call one of the staff listed on the webpage, or send requests to the specific email address.</p> <p>Additional information can also be found on the webpage: <a href="http://www.oregon.gov/DAS/EAM/Pages/pcm/index.aspx">http://www.oregon.gov/DAS/EAM/Pages/pcm/index.aspx</a></p>
<p>b. What forms are used/ needed to request this service?</p>	<p>PA request located at: <a href="http://www.oregon.gov/DAS/EAM/pcm/docs/project_authorization_201106.pdf">http://www.oregon.gov/DAS/EAM/pcm/docs/project_authorization_201106.pdf</a></p>
<p>c. When can you expect to have your service request fulfilled?</p>	<p>If the essential information is provided by the customer, the task can be completed in one to three weeks. If the project is complex and incomplete information is provided, the timeline would be extended.</p>
<p><b>3. How do I get help? How does P&amp;CM provide support to customers?</b></p>	<p><b>Description</b></p>
<p>a. Self-service support</p>	<p>References for the following resources are found on the P&amp;CM website:</p> <ul style="list-style-type: none"> <li>• How to plan an office relocation</li> <li>• Funding resources</li> <li>• Description of the phases of a project</li> <li>• Discussion of how you can help with the project</li> </ul>

	<p>The P&amp;CM website:  <a href="http://www.oregon.gov/DAS/EAM/Pages/pcm/index.aspx">http://www.oregon.gov/DAS/EAM/Pages/pcm/index.aspx</a></p> <p>Policy on procedures for requesting help:  <a href="http://www.oregon.gov/DAS/EAM/docs/1256220.pdf">http://www.oregon.gov/DAS/EAM/docs/1256220.pdf</a></p> <p>Technical standards for remodeling or modifications:  <a href="http://www.oregon.gov/DAS/EAM/docs/1256211.pdf">http://www.oregon.gov/DAS/EAM/docs/1256211.pdf</a></p>
b. How to request support	All documents and contact numbers are available at: <a href="http://www.oregon.gov/DAS/EAM/Pages/pcm/index.aspx">http://www.oregon.gov/DAS/EAM/Pages/pcm/index.aspx</a>
c. When can you expect to get a response?	You will be contacted within two business days when the request is sent to the email address: <a href="mailto:PCM.support@oregon.gov">PCM.support@oregon.gov</a>

## 2- Construction Management – Execution

1. What is the service?	Description
a. Service Summary	<p>Execution within Construction Management provides the project management of the construction project. This includes resource management and contract management. In this service we monitor, identify, and mitigate any project risks.</p> <p>Ongoing project updates including timeline and budget changes are part of this service.</p>
b. What is included?	<p><b>General Consultation</b></p> <p><b>Facilitation of information meetings-</b> schedule, coordinate and run meetings</p> <p><b>Solicit, manage, and administer contracts-</b> These are contracts related to the actual construction project and will include Construction firms, Architects, and Engineers</p> <p><b>Managing and directing the assigned project resources and staff-</b> oversight of any staff that are assigned to the project</p> <p><b>Responsible for identifying, monitoring, documenting, and responding to risk</b></p> <p><b>Controls and monitors key project elements</b> —project scope, time, cost, and quality</p> <p><b>Point of contact for building/site-</b> the project manager will be the only point of contact that agencies need to work with on our projects</p> <p><b>Site inspection (ongoing/final)</b> - throughout the project inspections are conducted to verify progress and work quality.</p> <p><b>Develop full-scale project plans and associated communications documents</b></p>

	<p><b>Develop and deliver progress reports, proposals, requirements documentation, and presentations</b></p> <p><b>Review and provide floor plan drawings-</b> these can be either PDF or CAD documents</p> <p><b>Invoice review and approval-</b> every invoice is reviewed and either approved or corrected</p> <p><b>Project close out –</b> A close out document is completed once all of the work is completed and all payments have been made</p>
c. What is not included in the service?	We do not disseminate information to our customer's staff. Therefore, an agency contact will be provided by the customer to be the project point of contact and disseminator of information to the customer's staff. We cannot fulfill the role of the agency contact.
d. Offerings and options	<p>All of these services would be supplied together. They should not be broken out. All can be codependent based on the project type and size. They may not all be required on all projects.</p> <p>Ad hoc construction and project management consultation services.</p> <p>Drawings can be provided in CAD or PDF and either electronically, on CD, flash drive, or hard copy.</p>
e. Service prerequisites	<p>Budget commitment by the agency.</p> <p>Planning feasibility to be complete.</p> <p>A signed contract between the agency and P&amp;CM.</p>
f. (Service-specific) Customer and provider responsibilities	<p><b>Planning and Construction Management responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Written project timeline reports</li> <li>• Written project status reports</li> <li>• Written list of additional scope needs</li> <li>• Written list of contractor staff for background checks</li> <li>• Written budget execution updates</li> <li>• Written project completion memo</li> <li>• Written final budget</li> </ul> <p><b>Client responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Quickly provide any changes in scope, budget, or the timeline</li> <li>• Contractor background checks</li> <li>• Communicate with their staff and decision makers</li> <li>• Respond within agreed upon timeline</li> <li>• Appoint an agency contact designee</li> </ul>
<b>2. How is the service requested?</b>	<b>Description</b>
a. How is this service requested?	Through a Project Authorization (PA) request. Call one of the staff listed on the webpage, or send requests to the specific email address.

	Additional information can also be found on the webpage: <a href="http://www.oregon.gov/DAS/EAM/Pages/pcm/index.aspx">http://www.oregon.gov/DAS/EAM/Pages/pcm/index.aspx</a>
b. What forms are used/ needed to request this service?	PA request located at: <a href="http://www.oregon.gov/DAS/EAM/pcm/docs/project_authorization_201106.pdf">http://www.oregon.gov/DAS/EAM/pcm/docs/project_authorization_201106.pdf</a>
c. When can you expect to have your service request fulfilled?	By the date agreed to in the project timeline
<b>3. How do I get help? How does P&amp;CM provide support to customers?</b>	<b>Description</b>
a. Self-service support	Project phase description is located on our website: <a href="http://www.oregon.gov/DAS/EAM/Pages/pcm/index.aspx">http://www.oregon.gov/DAS/EAM/Pages/pcm/index.aspx</a>
b. How to request support	Call to: Nora Leahy at 503-373-7169 Barry Jones at 503-373-7211  Or  Complete a Project Authorization request found at: <a href="http://www.oregon.gov/DAS/EAM/pcm/docs/project_authorization_201106.pdf">http://www.oregon.gov/DAS/EAM/pcm/docs/project_authorization_201106.pdf</a>
c. When can you expect to get a response?	You will be contacted within two business days when the request is sent to the email address: <a href="mailto:PCM.support@oregon.gov">PCM.support@oregon.gov</a>

## 8.2. SLA performance measure data dictionary

This section includes a description of the performance metrics and the associated service level expectations/ performance targets agreed between customers and DAS P&CM.

### SLA Metric # 1: Quality of completed plans that meet the customer needs

- **Description:** Average rating of question "How well did the completed plans meet your needs?" on a scale of 1 to 5.

- **Purpose:** This metric was selected by the SLA team to measure the quality of plans created for customers of DAS P&CM.

DAS P&CM will survey the customers who have requested a completed planning/feasibility study or have had a project completed in order to gather quantitative and qualitative feedback on the delivery of services.

It is expected that using surveys and tracking on this measure will assist DAS P&CM and customer members of the EAM Customer Board to understand and make data-driven decisions to improve the plans created by DAS P&CM.

- **Comparability:** None known at this time.
- **Measure calculation formula:**
  - **A = (B / N)**
    - **B (Numerator)** = Sum of the ratings given by survey respondents to the quality of completed plans, in response to a specific question (“In a 1-5 scale, with 1 being “Strongly Disagree” and 5 being “Strongly Agree”, how well did the completed plans meet your needs?”) on customer surveys completed by customer agency employees in the measurement period.
    - **N (Denominator)** = Number of instances the question was answered.
    - Results (score on “how well did the completed plans meet your needs?”) from all survey responses received in the measurement period for projects with completed plans delivered to customers will be added up and divided by the total number of surveys received to calculate the average rating for the quality of the completed plans.
- **Detailed metric definition / calculation:**
  - This measure will be tracked using a survey tool in conjunction with DAS P&CM.
  - Surveys will be conducted at the closing of an executed planning and feasibility project or after the planning/feasibility stage of a construction project if the project is determined to not be going into the execution phase.
  - Surveys will be sent to the agency contact assigned to the project.
  - A quarantine period of 60 days will be used to not over survey the population being serviced by the DAS P&CM Program.
  - Additional stratification of results can be developed and reported, tracking the results across different elements (per individual project, per customer agency, per type of project, etc.).
- **Baseline:** Not available at this time.
- **Service Level Expectation (Quantitative performance target):** None at this point; agreement to measure and set target at CUB when 6 -9 months' worth of data are available.
- **Frequency of reporting/timeliness:** Quarterly.
- **Attachments:** None.

## **SLA Metric # 2: Quality of completed projects that meet the customer needs**

- **Description:** Average rating of question "How well did the completed project meet your needs?" on a scale of 1 to 5.
- **Purpose:** This metric was selected by the SLA team to measure the quality of delivered projects for customers of DAS P&CM.

DAS P&CM will survey the customers who have had a project completed in order to gather quantitative and qualitative feedback on the delivery of services.

It is expected that using surveys and tracking on this measure will assist DAS P&CM and customer members of the EAM Customer Board to understand and make data-driven decisions to improve the projects delivered by DAS P&CM.

- **Comparability:** None known at this time.
- **Measure calculation formula:**
  - **A = (B / N)**
    - **B (Numerator)** = Sum of the ratings given by survey respondents to the quality of completed projects, in response to a specific question ("In a 1-5 scale, with 1 being "Strongly Disagree" and 5 being "Strongly Agree", how well did the completed project meet your needs?") on customer surveys completed by customer agency employees in the measurement period..
    - **N (Denominator)** = Number of instances the question was answered.
    - Results (score on "how well did the completed project meet your needs") from all survey responses received in the measurement period for completed projects will be added up and divided by the total number of surveys received to calculate the average rating for the quality of the completed projects.
- **Detailed metric definition / calculation:**
  - This measure will be tracked using a survey tool in conjunction with Planning and Construction Management.
  - Surveys will be conducted at the closing of an executed construction project.
  - Surveys will be sent to the agency contact assigned to the project.
  - A quarantine period of 60 days will be used to not over survey the population being serviced by DAS P&CM Program.
  - Additional stratification of results can be developed and reported, tracking the results across different elements (per individual project, per customer agency, per type of project, etc.).
- **Baseline:** Not available.
- **Service Level Expectation (Quantitative performance target):** None at this point; agreement to measure and set target at CUB when 6 -9 months' worth of data are available.
- **Frequency of reporting/timeliness:** Quarterly.
- **Attachments:** None.

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### SLA Metric # 3: Timely response to project requests

- **Description:** Percent of projects for which a decision on project approval/denial (or deferred decision) has been communicated to requesting agency within 8 calendar days from submission of request.
  - **Purpose:** This measure was selected in an attempt to track timely communication with customers about project requests, which was identified as a critical service quality attribute for the provision of Planning and Construction services.
  - **Comparability:** None known at this point.
  - **Measure calculation formula:**
    - **A = (B/ C)\*100**
    - **B (Numerator)** = Number of projects for which a decision on project approval/denial (or deferred decision) has been communicated to requesting agency within 8 calendar days from submission of request.
      - For each project request, a check will be performed to verify the following condition is met:  **$(B_2 - B_1) \leq 8$  calendar days**, where:
      - **B<sub>1</sub>**= Date project request is received by DAS P&CM.
      - **B<sub>2</sub>**= Date an email notification is sent to customer agency communicating decision on project approval/denial (or deferred decision).
    - **C (Denominator)** = Total number of projects for which a decision on project approval/ denial (or deferred decision) has been communicated to the requesting agency in the last quarter.
  - **Detailed metric definition/calculation formula:**
    - This measure will be tracked manually by DAS P&CM staff with the aid of an Excel log file.
    - This measure will be tracked for all projects DAS P&CM is responsible for approving, irrespective of what agency or program within an agency is assigned responsibility for project execution (projects could be executed by DAS Maintenance, DAS Construction and Project Management or agencies with internal resources).
  - **Baseline:** None.
  - **Service Level Expectation (Quantitative performance target):** 85%
  - **Frequency of reporting/measurement:** Quarterly.
  - **Attachments:** None.
-

#### SLA Metric # 4: Project delivered by agreed upon date

- **Description:** Percentage of time the project was completed by the initial agreed upon date between the customer and Planning and Construction Management.
  - **Purpose:** The intent of this measure is to track the frequency with which DAS P&CM meets the mutually agreed upon timeframe to finish the executed project.
  - **Comparability:** None known at this time.
  - **Measure calculation formula:**
    - $A = (B / C) * 100$ 
      - **B (Numerator)** = Number of instances a project was completed by the mutually agreed upon date in the measurement period.
      - **C (Denominator)** = Number of projects completed in the measurement period.
    - The planned date for the project completion and the date it is completed will be tracked by individual project .This will help determine whether the Program was able to meet the mutually agreed upon timeline.
  - **Detailed metric definition / calculation:**
    - Tracking this SLA measure requires logging a) mutually agreed date for project completion and b) date of actual completion by the Program.
    - **Numerator:**
      - Scope, time and budget changes after the project has started will not have an effect on the initial mutually agreed upon project delivery date.
    - **Exclusions:**
      - Limited to projects completed in the reporting period.
  - **Baseline:** During the 13-15 Biennium, 29 projects were completed with 27 being delivered by the mutually agreed upon date. This represents a 93% success rate of projects being completed on time.
  - **Service Level Expectation (Quantitative performance target):** 90%
  - **Frequency of reporting/timeliness:** Quarterly.
  - **Attachments:** None.
- 

#### SLA Metric # 5: Timely communication throughout project

- **Description:** Average rating of question "How well did the communication throughout the process meet your needs?" on a scale of 1 of 5.
- **Purpose:** This metric was selected by the SLA team to measure the quality of communication to customers of DAS P&CM.

DAS P&CM will survey the customers who have requested a completed planning/feasibility study or have had a project completed in order to gather quantitative and qualitative feedback on the delivery of services.

It is expected that using surveys and tracking on this measure will assist DAS P&CM and customer members of the EAM Customer Board to understand and make data-driven decisions to improve the communication of DAS P&CM.

- **Comparability:** None known at this time.
- **Measure calculation formula:**
  - **A = (B / N)**
    - **B (Numerator)** = Sum of the quality of timely communication ratings (in a scale of Strongly Agree to Strongly Disagree weighted in a scale of 1-5, with 5 being Strongly Agree), as per specific question on “How well did the communication throughout the process meet your needs?” completed by customer agency employees in the measurement period.
    - **N (Denominator)** = Number of instances the question was answered in the measurement period.
  - Results (score on “How well did the communication throughout the process meet your needs”) from all survey responses received in the measurement period for projects with completed plans to customers will be added up and divided by the total number of surveys received to calculate the average rating for the quality of communication throughout the process.
- **Detailed metric definition / calculation:**
  - This measure will be tracked using a survey tool in conjunction with Planning and Construction Management.
  - Surveys will be conducted at the closing of an executed project or after the planning/feasibility stage if the project is determined to not be going into the execution phase.
  - A quarantine period of 60 days will be used to not over survey the population being serviced by DAS P&CM Program.
  - Surveys will be sent to the agency contact assigned to the project.
  - Additional stratification of results can be developed and reported, tracking the results across different elements (per individual project, per customer agency, per type of project, etc.).
- **Baseline:** Not available.
- **Service Level Expectation (Quantitative performance target):** None at this point; agreement to measure and set target at CUB when 6 -9 months' worth of data are available.
- **Frequency of reporting/timeliness:** Quarterly.
- **Attachments:** None.

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#### SLA Metric # 6: Hours predicted for Execution

- **Description:** Percentage of times projects are completed within 10% of the initially agreed upon timeline.
- **Purpose:** The intent of this measure is to track the frequency with which DAS P&CM meets the project manager's estimated time needed to complete the project.
- **Comparability:** None known at this time.
- **Measure calculation formula:**
  - **A = (B/C)\*100**
    - **B (Numerator)** = Number of projects that were completed within 10% of the initially agreed upon timeframe.
    - **C (Denominator)** = Number of projects completed within in measurement period.
- **Detailed metric definition / calculation:**
  - Tracking this SLA measure requires logging a) number of project manager hours planned for each project and b) hours actually worked by project managers in each project.
  - **Denominator:**
    - Scope changes and other changes to the project will not change the initial estimate for hours predicted for project execution.
  - **Exclusions:**
    - This measure excludes:
      - Planning & feasibility projects, or
      - Hours planned or worked in the planning & feasibility stage of a construction project.
- **Baseline:** Not available.
- **Service Level Expectation (Quantitative performance target):** 90%
- **Frequency of reporting/timeliness:** Quarterly.
- **Attachments:** None.

#### SLA Metric # 7: Projected Expenditure

- **Description:** Percentage of times projects are completed within 10% of the initially agreed upon budget.
- **Purpose:** The intent of this measure is to track the frequency with which DAS P&CM meets the project manager's estimated budget needed to complete the project.
- **Comparability:** None known at this time.

- **Measure calculation formula:**
  - $A = (B / N) * 100$ 
    - **B (Numerator)** = Number of projects completed within 10% of the initially agreed upon budget.
    - **N (Denominator)** = Total number of projects completed during the measurement period.
- **Detailed metric definition / calculation:**
  - Tracking this SLA measure requires tracking a) amount projected to be spent on the project and b) amount actually spent on the project.
  - **Numerator:**
    - Scope changes and other changes to the project and budget will not change the initial mutually agreed upon budget calculation.
- **Baseline:** During the 11-13 and 13-15 Biennium, 88 projects were completed with 79 being delivered by at or under the initial mutually agreed upon budget. This represents a 90% success rate of projects being completed within budget.
- **Service Level Expectation (Quantitative performance target):** 87%
- **Frequency of reporting/timeliness:** Quarterly.
- **Attachments:** None.

### 8.3. Rate methodologies

DAS P&CM is self-funded through hourly rates that are designed to recover the operational cost incurred for the delivery of the services offered by the Program.

Hourly charges are billed at different rates according to the Project Manager role. The four roles are: Senior Project Manager, Mid-Level Project Manager, Interior Project Manager, and Entry Level Project Manager.

The list of current charges can be found on the most current price list of EAM goods and services below.

Link to the published price list for updated rate information:  
<http://www.oregon.gov/DAS/CUB/docs/eam/pricelist.pdf>