PROJECT MANAGEMENT

DISTRICT LEADERSHIP GUIDE

THE myFacilities APPROACH TO

Managing School Construction Projects With Confidence

A practical guide to clearer budgets, coordinated teams, and a better handover with myFacilities software.

PUBLISHED BY

myFacilities

BUILT FOR

K-12 district leaders

FOCUS

Planning through closeout

Clarity from the first plan to the final handover.

A stronger project process. A more confident district.

myfacilities.us



EXECUTIVE BRIEF

Confidence is a management practice.

Know what is planned, what has changed, who needs to act, and what must be ready before students return.

A school construction project is more than a building assignment. It is a promise to students, staff and the community. Whether the work is a classroom renovation, an HVAC replacement or a new campus building, district leaders need a project process they can understand, explain and sustain.

The myFacilities approach is to organize that process around four connected phases: **Pre-Construction, Bidding, Construction and Close Out**. The aim is not to create more administration. It is to make the essential decisions, responsibilities and records easier to manage. [1]

Plan clearly

Define the need, the constraints and the evidence required for a decision.

Coordinate daily

Keep the next action, responsible person and current information together.

Finish deliberately

Treat documentation, training and operational readiness as project deliverables.

What you will take away

A lifecycle you can use. Follow the four-phase roadmap, with practical checkpoints for scope, budgets, schedules, changes and closeout.

Tools your team can put to work. Use the project brief, weekly control sheet, leadership update and handover checklist to make expectations visible.

A focused way to evaluate software. Bring one real project to a myFacilities demonstration and test the work your team actually needs to perform.

THE CENTRAL IDEA

Project confidence comes from a shared, current picture of the work, supported by clear ownership and evidence.

For facilities directors, capital-project teams, school business officials, superintendents and board members. This is a practical guide from myFacilities, not a customer outcomes study. The tools and scenarios are recommended practices built around the myFacilities roadmap.

READER NAVIGATION

Inside this guide

Read the approach first, go straight to your project phase, or print the practical tools for your next team meeting.

THE APPROACH

School projects need a district-centered view 4
One project. A clearer picture. 5
The four-phase myFacilities roadmap 6

THE PROJECT LIFECYCLE

Pre-Construction: define the right project 7
Connect scope, budget and schedule 8
Bidding: carry the plan forward 9
Construction: make coordination repeatable 10
Protect the school calendar 11
Keep cost decisions traceable 12
Put documents to work 13
Make the monthly report a decision tool 14
Close Out: finish with evidence 15
Turn a completed project into usable knowledge 16

FROM APPROACH TO ACTION

An illustrative renovation walkthrough 17
Start with one project 18
Measure the efficiency you want to improve 19
Make your software demonstration count 20

PRACTICAL TOOLS

Project kickoff brief 21
Weekly project control sheet 22
Monthly leadership update 23
Closeout readiness checklist 24

SOURCES AND NEXT STEP

How this guide was developed 25
Bring your next project into focus 26

The contents are linked in the PDF and Word document. Page numbers refer to this edition; update them after substantial edits.

THE APPROACH / 01

School projects need a district-centered view.

The contractor may manage the worksite. Your district still needs a clear view of the decisions that affect its schools.

Think about the questions that reach the district office: Will the classrooms be ready? What changed in the budget? Is there a decision waiting on us? Which documents will the maintenance team receive? A useful project-management approach starts with those questions, then works backward to the information needed to answer them.

DISTRICT PRIORITY	WHAT TO MAKE VISIBLE
The school calendar	Access windows, testing periods, planned interruptions, staff preparation and the date the space is needed.
Financial stewardship	The approved scope and budget, current cost information, proposed changes and decisions still required.
Many participating teams	A named district lead, clear decision responsibilities and an agreed route for technical review.
Public confidence	A concise account of progress, exceptions, next milestones and the evidence behind the update.
Long-term operations	The records, training and equipment information needed after the project team leaves.

Replace the chase with a review routine

When each participant holds a different part of the story, the district can spend its review time assembling an update instead of deciding what to do. The recommended alternative is simple: agree where the project record lives, who updates it, when it is reviewed and which exceptions must be escalated.

A PRACTICAL TEST

Before the next project meeting, ask three people for the current completion date, the latest budget position and the next district decision. If the answers differ, start by reconciling the project record.

These are planning questions and recommended operating practices, not survey findings about school districts or measured results from myFacilities customers.

THE APPROACH / 02

One project. A clearer picture.

Bring the project conversation back to the scope, the work, the timing and the supporting information.

With myFacilities, your district can assign project work, oversee budgets, track progress, manage schedules and retain information for facility projects and renovations. Project management sits alongside wider facilities-management tools in a school-focused platform. [2]

THE PROJECT

School / Purpose / District lead / Required outcome

Work	Time	Budget	Information
What must happen next? Who is responsible?	What is planned? What is changing?	What is the current position? What needs review?	What supports the decision? Where is the record?

Conceptual project-control model for this guide. This is not a screenshot or a specification of a particular product interface.

Use the software to support a shared working method

For each project, agree a small set of required information. Make myFacilities part of that routine and give the district lead responsibility for maintaining the current picture. Ask participants to update their work before the regular review. Use that meeting to address exceptions, not to reconstruct the previous week.

A disciplined project record can make the next conversation more useful: rather than asking everyone for a separate update, the team can examine the unresolved issue, identify the decision and agree what happens next. This is the intended operating benefit to test during your evaluation.

START WITH YOUR PROJECT, NOT A GENERIC FEATURE TOUR

Ask myFacilities to demonstrate your actual review routine: **find the project, review assigned work, inspect the schedule and budget information, and retrieve a supporting document.** Confirm the workflow and configuration that fit your district.

Specific approval paths, integrations, permissions and retention arrangements should be confirmed in a demonstration and the agreed product scope.

THE APPROACH / 03

The four-phase myFacilities roadmap

A consistent lifecycle keeps the district focused on the right questions as a project moves from an idea to an operating facility.

01

Pre-Construction Phase | Define the project

Options, professional selection, budget, financial coordination, delivery strategy, schedule, value engineering, cost estimating and constructability.

02

Bidding Phase | Reconfirm the plan

Revisit the roadmap's planning responsibilities against the project moving forward, with coordinated decisions, meetings and reporting.

03

Construction Phase | Coordinate delivery

Documents, project coordination, scheduling, progress, quality, payment applications, changes, inspections and monthly reports.

04

Close Out Phase | Complete the handover

Closeout planning, system coordination, equipment testing and training, final inspections, documentation and a lasting project record.

Phase names and responsibilities adapted from the myFacilities Project Management Roadmap, page 1. [1]

Use a checkpoint at each transition

Before moving on, record what is complete, what remains unresolved, who accepts the remaining responsibility and which information must travel into the next phase. The specific checkpoint evidence throughout this guide is a recommended implementation practice, not an additional list of promised software functions.

ONE CONTINUOUS RECORD

Planning decisions should remain understandable during construction. Construction changes should remain understandable during closeout. Closeout records should remain useful after occupancy.

PHASE 01 / PRE-CONSTRUCTION

Define the right project before directing the work.

Start with the need the district is trying to address, not simply the first proposed solution.

The roadmap begins with selecting design and contractor professionals, evaluating project options, developing a budget, coordinating financial considerations and choosing a delivery strategy. It also includes design coordination, constructability reviews, estimating, value engineering, scheduling and monthly reporting. [1]

Make the project brief the starting point

Write a short description of the problem, the affected school or space and the intended result. Distinguish essential requirements from preferences. Record known limitations, including access, school activities, existing conditions and unresolved technical questions. Ask the appropriate district and design representatives to confirm that the brief reflects the need.

RECOMMENDED RECORD	WHAT IT SHOULD EXPLAIN
Need and intended outcome	Why the project is being considered and what a successful result would allow the school to do.
Options and assumptions	What alternatives were considered, what is known and which assumptions still need validation.
Roles and delivery approach	Who advises, who coordinates, who makes district decisions and how responsibilities are organized.
Initial budget and milestones	The planning basis, key dates, estimate assumptions and decisions needed to move forward.

Keep professional judgment visible

Use assigned project work and stored information in myFacilities to keep planning activity organized. Keep design selection, technical judgments, financial arrangements and formal authorization with the people responsible for those decisions. A complete record helps the district understand a recommendation; it does not replace qualified advice.

RECOMMENDED PHASE CHECKPOINT

Can the district explain **what it is trying to achieve, which option it is pursuing, the planning budget, the required timing and the decisions still outstanding**? Keep the accepted brief with the project.

PHASE 01 / PLANNING DISCIPLINE

Connect scope, budget and schedule.

A change to one part of the plan should trigger a review of the other two.

The roadmap treats budgeting, estimating, delivery strategy, scheduling, constructability and value engineering as connected planning work. Use the planning review to reconcile them before the project advances. [1]

Scope

What is included?
What is excluded?
What defines completion?

Budget

What is the estimate based on?
What remains uncertain?
Who reviews changes?

Schedule

When can work happen?
What must come first?
When is the space needed?

Document the basis, not just the number

For each estimate, identify the date, scope, source and assumptions. Keep district-approved budget information distinct from preliminary estimates. Note any unresolved scope or timing question that could change the planning position. Use a consistent review date so the team knows which version supports the next decision.

Evaluate value without losing the purpose

When considering an alternative, write down what changes in cost, timing, function, maintainability and user needs. Record the recommendation and its rationale. Ask the responsible professionals to evaluate technical consequences rather than treating the least expensive option as automatically equivalent.

BEFORE ACCEPTING A PLANNING CHANGE	EVIDENCE TO RETAIN
Does it still address the original need?	The revised scope and a short comparison with the accepted brief.
What happens to cost and timing?	The updated estimate assumptions and affected milestones.
Who accepts the recommendation?	The decision, responsible authority, date and any remaining condition.

USE THE PROJECT RECORD DELIBERATELY

Maintain an accepted planning baseline and a clearly identified current working position. Agree how those versions will be labeled and retained in your chosen workflow. Do not rely on a filename alone to communicate approval.

PHASE 02 / BIDDING

Carry the plan forward without losing the decisions behind it.

The handoff into bidding is a chance to confirm that the project being advanced is the project the district understands.

In the myFacilities roadmap, the Bidding Phase repeats the planning responsibilities listed in Pre-Construction. This guide preserves that emphasis: revisit professional selection, options, budget, financial coordination, delivery strategy, schedule, value engineering, estimating, constructability, reports and design meetings as the project moves forward. [1]

Reconcile the package with the accepted plan

Ask the project team to identify what changed after the planning review. Record the implications for district expectations, cost assumptions and timing. Where a question is still open, give it a responsible reviewer and a target decision date instead of allowing it to disappear into meeting discussion.

REVIEW FOCUS	QUESTION FOR THE DISTRICT TEAM
Project options and scope	Does the current package reflect the selected option and the required result?
Budget and financial coordination	Does the district understand the current planning position and any unresolved funding question?
Delivery strategy and schedule	Are responsibilities, key dates and the school access window still aligned?
Estimating and constructability	Have relevant reviews been completed and their recommendations addressed?
Meetings and reporting	Can leadership see the changes, open decisions and next step in one concise update?

Keep a clear transition record

Retain the current project information, review notes and district decisions with the project. Identify which documents are being used for the next step and what remains subject to confirmation. Formal procurement and selection procedures remain the responsibility of the district and its authorized advisers.

RECOMMENDED PHASE CHECKPOINT

Before construction coordination begins, the district lead can explain **the current scope, cost position, schedule, participating team and unresolved decisions** using an agreed set of records.

Keep district decisions understandable as the project moves from planning into delivery. The current package and its supporting decisions should tell the same story.

PHASE 03 / CONSTRUCTION

Make coordination repeatable.

A useful meeting ends with clear actions. A useful project record makes those actions easy to review next time.

The Construction Phase brings together pre-construction conferences, construction documents, project coordination, scheduling, progress, quality, payment applications, changes, inspections and monthly reports. [1] A regular operating rhythm keeps those responsibilities connected.

Establish the coordination routine

Use the opening conference to agree the district contact, the meeting rhythm, the location of the project record, the method for documenting decisions and the route for urgent issues. Confirm what information each participant should update before the next review.

AT EACH REVIEW	LEAVE WITH A CLEAR RECORD
Look ahead	Upcoming work, required access, dependencies and district decisions that could affect progress.
Review exceptions	What is late, blocked, changed or awaiting technical review, with a responsible person and next action.
Coordinate documents	Which information supports the work and whether a clarification or revised document is needed.
Review quality and inspections	Findings requiring follow-up, the responsible professional and the evidence needed to resolve them.
Close the meeting	Agreed actions, decision dates and the next review point, not simply a record that a meeting occurred.

Separate information, action and authorization

A progress update describes what happened. An action identifies work someone must complete. An authorization permits a decision under the applicable project arrangements. Keep those distinctions clear. Updating a task should not silently stand in for a technical acceptance or district approval.

MYFACILITIES IN PRACTICE

Turn agreed follow-up into assigned project work in myFacilities. Keep **the next action, responsible person and target timing** clear, with enough supporting context for the next review.

PHASE 03 / SCHEDULE COORDINATION

Protect the school calendar.

Build the conversation around readiness for school use, not only the date a construction activity is expected to end.

Schedule development and monitoring appear in the planning phases, and construction scheduling and progress monitoring continue during delivery. [1] Apply that continuity to the dates that matter to the school community.

Work backward from the required school outcome

Identify the date the district needs the space, then discuss what must be complete before it can be used. Depending on the project, that may include inspections, equipment testing, training, cleaning, furniture setup or staff preparation. The responsible project professionals should confirm the appropriate sequence and readiness requirements.

MILESTONE TYPE	RECOMMENDED REVIEW QUESTION
School-use date	When does the district need this space, and which functions must be available?
Construction milestone	Which activities must be completed before the next stage can proceed?
Information or decision date	Which document, clarification or district decision is needed to protect the plan?
Access or interruption window	What school activity, access constraint or planned shutdown must be coordinated?
Readiness milestone	What evidence and preparation are needed before the district can use and operate the space?

Make changes understandable

When a date moves, record the reason, the affected milestone and the next response. Review whether the change affects school activities, cost assumptions, inspections, training or communications. Distinguish the original agreed date from the latest forecast rather than rewriting the history of the plan.

ASK THIS AT THE WEEKLY REVIEW

What could prevent the next school-critical milestone from being achieved, and what decision or action is needed now? A visible dependency is more useful than an unexplained percentage complete.

Use the schedule discussion to surface the next consequential action early. Keep the forecast, its basis and the responsible reviewer clear.

PHASE 03 / COST AND CHANGE COORDINATION

Keep cost decisions traceable.

Make it possible to follow a proposed change from the reason it arose to the decision and the resulting project update.

The roadmap includes processing payment applications, processing change orders, recommending changes and construction cost-related coordination. [1] Use a disciplined review record to connect those activities without confusing a proposal, an approval and a payment.

A recommended change-review sequence

1. Describe the issue. Record the affected work, why a change is proposed and the supporting information.

2. Review the consequences. Ask the responsible participants to assess scope, cost, timing and school-use implications.

3. Identify the decision. Name the authorized decision maker and record the outcome, date and any conditions.

4. Update the project picture. After the appropriate authorization, reconcile the affected budget information, schedule, work and documents.

KEEP THESE SEPARATE	WHY THE DISTINCTION MATTERS
Approved budget / latest forecast	The agreed funding position and the current expectation answer different questions.
Proposed change / authorized change	Discussion or submission is not the same as permission to proceed.
Payment application / payment status	A request for payment, its review and confirmation of payment are separate records.

Make payment review easier to follow

Keep the application, relevant review notes and supporting project information together. Record who is reviewing the item and what remains outstanding. Reconcile cost information with the district finance process instead of assuming a project record is the accounting system.

A USEFUL CONTROL QUESTION

Can someone reviewing the project later determine **what changed, why it changed, who authorized it and how it affected the current position**?

This is a recommended coordination workflow. Software does not replace authorized approvals, professional payment certification or the district accounting process; automated routing and integrations require confirmation.

PHASE 03 / DOCUMENTS AND COMMUNICATION

Put documents to work.

The goal is not simply to store more files. It is to make the right project information understandable when someone needs it.

Construction documents, design coordination meetings, project meetings, monthly reporting and closeout documentation all appear in the roadmap. [1] Treat them as a connected record of the project rather than separate administrative tasks.

Agree a simple information structure

Organize the record so a participant can distinguish the current working information, accepted decisions, superseded material and final handover documents. Use a consistent naming convention and identify a responsible person for keeping the structure current. Confirm how this structure will be maintained in your myFacilities workflow.

RECOMMENDED INFORMATION GROUP	TYPICAL CONTENTS TO ORGANIZE
Project definition	Accepted brief, options, assumptions, scope and relevant district decisions.
Planning and delivery	Schedule information, construction documents, coordination notes and supporting reviews.
Cost and changes	Budget information, proposed and authorized changes, payment review support and reconciliation notes.
Meetings and reporting	Action records, significant decisions, monthly updates and supporting evidence.
Closeout and handover	Final documents, inspection and testing records, training information and the handover index.

Give each record enough context

Include a clear title, relevant project or location, date, status and responsible contact. When a document supports a decision, retain that relationship in the record. Where information has been superseded, make the distinction visible to the team using the current package.

THE RETRIEVAL TEST

Ask a colleague who did not create the file to find the latest relevant document and explain its status. If they cannot, improve the structure before adding more folders.

During your myFacilities demonstration, test document retrieval with the people who will use the project record, including the district facilities team.

PHASE 03 / LEADERSHIP VISIBILITY

Make the monthly report a decision tool.

Give leaders the current position, the important exceptions and the decisions that need their attention.

Monthly reports are included in the Pre-Construction, Bidding and Construction phases of the roadmap. [1] Use a consistent district reporting structure so leaders can follow the project across those transitions without learning a new format each time.

A recommended one-page leadership view

REPORT ELEMENT	WHAT TO SHOW
Purpose and current phase	The school, project lead, intended outcome and stage of work.
Progress since last review	Material work completed and the evidence supporting the update.
Schedule and readiness	The next milestone, latest expected date and any school-use implication.
Budget and changes	The current budget position, changes requiring attention and assumptions still unresolved.
Risks and exceptions	The most consequential open issues, responsible people and response dates.
Decisions requested	The specific choice, recommendation, authorized decision maker and required date.
Next reporting point	Upcoming activities and what leadership should expect to see next.

Use status language that means something

Define your status terms. For example, "on plan" can mean no unresolved issue is currently expected to affect the next agreed milestone; "attention needed" can mean a named action is required to protect it. Show the explanation and date behind a status instead of relying on a color alone.

Keep detail available for follow-up, but do not turn the leadership report into a dump of every project task. The purpose is to support oversight and timely decisions while allowing the delivery team to manage its work.

END WITH THE DECISION

What does the district need to decide, who is responsible, and by when? A report without a clear request can leave a consequential issue visible but unresolved.

PHASE 04 / CLOSE OUT

Finish with evidence, not assumptions.

Plan the handover before the final weeks, then review it with the same discipline as the construction work.

The roadmap identifies a closeout program, system coordination, equipment testing and training, final inspections, closeout coordination, documentation and permanent document storage. [1] These responsibilities define a finish that extends beyond physical work alone.

ROADMAP RESPONSIBILITY	RECOMMENDED EVIDENCE TO COLLECT
Develop a closeout program	A list of required deliverables, responsible participants, target dates and the review process.
Coordinate systems	The relevant coordination record and a clear account of any open system-related issue.
Equipment testing and training	Records from the responsible parties and confirmation of the training provided to district staff.
Verify final inspections	Applicable inspection records and the status of findings that still require action.
Coordinate closeout	An agreed outstanding-items record, responsible people and documented resolution.
Submit documentation	A checked handover package with an index the district can understand and use.

Separate completion, readiness and record delivery

A contractor may report that work is complete while the district still needs training or documentation. Record those conditions separately and have the responsible people confirm the applicable requirements. The district should be able to see which item is outstanding and what evidence will resolve it.

RECOMMENDED PHASE CHECKPOINT

Can the district demonstrate that **the relevant work has been reviewed, required follow-up is assigned, staff have the information they need, and the final records have a clear home**?

Inspection, acceptance and occupancy decisions remain with the authorized parties. A software status or checklist is not itself evidence that a building is safe or approved for use.

PHASE 04 / OPERATIONAL CONTINUITY

Turn a completed project into usable knowledge.

The people operating the facility should not have to rediscover what the project team already learned.

Use the handover to transfer context, not just a folder of files. Ask the district facilities team what it will need to locate equipment, understand the work, contact the right parties and retrieve relevant information after construction coordination ends.

Build a handover index around operational questions

AFTER THE PROJECT, SOMEONE WILL ASK...	ORGANIZE THE HANDOVER SO THEY CAN FIND...
What changed in this school?	A plain-language summary of the completed scope and affected spaces or systems.
Where is the relevant information?	An index identifying final drawings, manuals, testing records and other agreed documentation.
Who can answer a question?	The appropriate district, design, contractor and equipment contacts, as applicable.
What training was provided?	Training topics, attendance or completion evidence, reference material and follow-up needs.
What remains open?	Outstanding items, responsibility, target dates and the evidence required for closure.
How will the records remain available?	The agreed location, responsible custodian, access arrangements and retention plan.

Make operations part of the review

Ask a facilities team member to use the handover package before the project team disperses. Can they find the information for a relevant system? Do they know what is final and whom to contact? Capture the gaps as specific closeout actions rather than general dissatisfaction after the fact.

A USEFUL FINISH

The last project milestone should leave the district better informed, not simply mark the end of construction activity.

The roadmap calls for "Permanent Document Storage." [1] Plan for long-term availability, while confirming actual retention, access, export and service terms. This wording should not be read as an unlimited or perpetual storage promise.

PUTTING THE APPROACH TO WORK

An illustrative renovation walkthrough

A classroom-wing renovation with a fixed school-use date. This scenario demonstrates a process, not a reported customer result.

Consider a district planning to renovate a classroom wing before the next school term. The facilities director coordinates the district review, the principal identifies school-use needs, and the project professionals address design and construction responsibilities. The team chooses a single project record and a regular review rhythm.

01 / PRE-CONSTRUCTION

Define the intended result

The district records which spaces are affected, what must be improved and when the wing is needed. Options are reviewed alongside budget assumptions, access constraints and the proposed delivery approach. An unresolved equipment question receives a named reviewer.

02 / BIDDING

Reconfirm the working plan

The team checks the advancing package against the accepted brief. A revised scope item is reconciled with the estimate and schedule. The district decision is retained with the relevant information so the next team does not have to reconstruct the reasoning.

03 / CONSTRUCTION

Manage the next consequential action

A delivery issue could affect the school-use milestone. The weekly review identifies the dependency, requests an updated response and records the district decision needed. Any proposed change is reviewed for scope, timing and cost before the project position is updated.

04 / CLOSE OUT

Verify the handover

The facilities team checks the documentation index, reviews training information and identifies one missing equipment record. The missing item remains assigned and visible until the responsible participant provides the agreed evidence.

WHAT TO TEST IN MYFACILITIES

Demonstrate this sequence using representative project information. The practical test is whether your team can **find the current position, identify the next action and retrieve the supporting record** with less effort.

No district name, project budget, savings percentage, completion-time improvement or customer endorsement is implied by this example.

ADOPTION / START SMALL

Start with one project and a clear working agreement.

An initial rollout should prove that the team can maintain useful information, not merely that the software can be opened.

Select a project with a manageable scope and a team willing to establish a shared routine. The following is a suggested four-week pilot plan, not a promised implementation timeline. Adjust it to your procurement, data preparation, configuration and training needs.

SUGGESTED STAGE	WHAT THE DISTRICT DOES	EVIDENCE OF PROGRESS
Week 1 Define the pilot	Choose the project, district lead and participating team. Record the current review process and the problems to improve.	A short pilot brief and a baseline of the effort needed today.
Week 2 Organize the record	Confirm the available workflow. Establish the project information, task ownership, key dates and document structure.	A current project record the team can locate and understand.
Week 3 Use it in a real review	Update the record before a project meeting. Use the meeting to review exceptions, decisions and follow-up work.	Actions have owners, dates and supporting context.
Week 4 Review and adjust	Ask users what was clearer, what was missing and where duplicate work remained. Compare the agreed measures.	A decision to refine the workflow, continue the pilot or expand.

Give the operating routine an owner

Name a district lead who can reconcile the project picture and help participants use the agreed structure. Set realistic expectations for updates. Decide which record is authoritative when the district, contractor or finance team maintains related information elsewhere.

Retire duplicate work deliberately

Do not remove an existing record until its purpose is understood and the replacement works for the people who rely on it. Where another system must remain, agree what information will be exchanged, who maintains it and how conflicting updates will be resolved.

PILOT SUCCESS

The team can prepare for a real meeting, identify an unresolved issue, make the required decision and leave a usable record. Expand because the working method is useful, not because every optional field has been populated.

ADOPTION / DEMONSTRATE VALUE

Measure the efficiency you want to improve.

Choose a small set of measures before the pilot, then compare like-for-like work after the team has used the process.

Efficiency should mean less avoidable effort and more dependable coordination, not simply faster task closure. Establish what your district does today and decide which improvement would matter most. The measures below are suggested pilot tools, not published myFacilities performance results.

SUGGESTED MEASURE	HOW TO DEFINE IT	WHAT IT CAN REVEAL
Report preparation effort	Staff hours spent assembling the same recurring project report.	Whether the current picture is easier to assemble.
Document retrieval effort	Time to locate an agreed set of representative project records.	Whether the information structure works for users.
Overdue coordination actions	Open actions past their agreed due dates, with reasons and responsibility.	Where follow-up or decision capacity is constrained.
Decision turnaround	Elapsed time from a complete decision request to the recorded decision.	Where review steps need attention.
Milestone variance	Difference between the accepted milestone date and the latest forecast.	Whether timing changes are visible early enough to discuss.
Handover completeness	Accepted required deliverables divided by applicable required deliverables.	What remains to be provided or reviewed.

Compare honestly

Use the same task definitions, participants and project context wherever possible. Note whether the project phase or workload changed. Separate actual observations from targets and estimates. Pair speed with record quality so the team is not rewarded for closing an item before the issue is resolved.

MAKE THE VALUE CASE CONCRETE

If reporting takes less time, document the observed difference and the work it frees the team to do. **Time released is not automatically a cash saving.** Consider subscription, configuration, training and ongoing administration when evaluating the overall investment.

These tools support local evaluation. They do not establish a guaranteed return, a benchmark, or a causal claim that software alone produced a project outcome.

YOUR EVALUATION / A PRACTICAL NEXT STEP

Make your software demonstration count.

Bring one real project and ask to see the work your team needs to do, from the first review to the final record.

Use a five-part demonstration

ASK TO SEE...	USE THIS TEST
A project overview	Can we understand the project purpose, current position and next significant action?
Assigned work and timing	Can the people responsible for follow-up identify what they need to do and when?
Budget information	Can we inspect the information our district uses to review the current cost position?
Supporting documents	Can a new participant locate the information behind a project discussion?
Our review routine	Can we use the demonstrated configuration in a weekly meeting and a monthly district update?

Three questions buyers often need to resolve

Our contractor already has a system. Why evaluate another? Start with the district's unanswered questions. Determine which record remains where and whether myFacilities can support the district review without unnecessary duplication.

Can we begin on a project already underway? Evaluate a limited scope: current project information, open actions, key dates and essential documents. Agree what history is needed and what can remain in the existing archive.

Will this replace our professionals or finance system? No part of this guide assumes that. Confirm where the software supports coordination and where technical review, authorized decisions or other systems remain necessary.

Before purchase, also confirm access controls, external participant arrangements, exports, retention, integrations, support, pricing and the exact modules included. These are evaluation questions, not feature assertions.

Request a project-focused myFacilities demonstration

admin@myfacilities.us | myfacilities.us

PRACTICAL TOOL / 01

Project kickoff brief

Use one brief to align the district, school users and project team before the next planning decision.

Project and location	Project name, school, building or affected spaces
District lead and sponsor	Who coordinates the record? Who accepts the district planning direction?
Need and intended outcome	What problem is being addressed, and what should be different when the project is complete?
Scope boundaries	What is included? What is excluded? Which questions remain unresolved?
Options and assumptions	Which alternatives were reviewed? What still requires professional validation?
Budget position	Planning estimate or approved budget; source, date and material assumptions
Timing and school-use needs	Key milestones, access restrictions, school-use date and required preparation
Delivery and decision roles	Project participants, review responsibilities and the route for district decisions
Next decision and evidence	Decision required, responsible person, target date and supporting information

Recommended use: review the brief when the scope, budget, schedule or delivery approach changes. Retain the date and basis of the accepted planning position.

PLANNING CHECKPOINT

Reviewed by: _____ Date: _____
Open conditions or next action: _____

PRACTICAL TOOL / 02

Weekly project control sheet

Keep the review focused on the next milestone, open actions and decisions needed to protect the plan.

Project / review date	
Next school-critical milestone	Milestone, latest expected date and person responsible for the update

Open actions and decisions

ACTION OR DECISION	RESPONSIBLE PERSON	DUE DATE	STATUS / EVIDENCE

Exceptions requiring coordination

Scope, cost or timing change	What changed? What needs review? What is the next authorized step?
Documents or technical review	What information or professional response is needed before work proceeds?
Access, quality or inspections	What must be coordinated, by whom, and what evidence will resolve the item?

CLOSE THE MEETING

Next review: _____
District decision required before then: _____

PRACTICAL TOOL / 03

Monthly leadership update

A one-page reporting structure for a district review. Use concise statements and keep supporting evidence available.

Project / reporting period	School, project name, district lead and reporting date
Purpose / current phase	Intended outcome and roadmap phase
Progress this period	Material progress and evidence supporting the update
Schedule and readiness	Next milestone, accepted date, latest forecast and school-use implication
Budget and changes	Approved position, latest forecast if available, pending changes and review status
Top exceptions	Issue, consequence, responsible person, response and target date
Decision requested	Specific decision, recommendation, authorized decision maker and required date
Next period	Upcoming activities, expected evidence and next reporting point

A USEFUL REPORTING STANDARD

Current as of: _____ Prepared by: _____

Label estimates and unresolved assumptions. Do not present proposed changes as approved.

Recommended template. The guide does not assert that this exact report is a native one-click software output.

PRACTICAL TOOL / 04

Closeout readiness checklist

Agree which items apply, who is responsible and what evidence the district needs before marking a requirement complete.

Project / review date	
District handover lead	

DELIVERABLE OR REVIEW	OWNER	STATUS	EVIDENCE / LOCATION
Closeout program and responsibilities agreed			
System coordination reviewed			
Equipment testing records received			
Required staff training documented			
Final inspection records reviewed			
Outstanding items assigned and tracked			
Agreed final documents submitted			
Handover index checked by district staff			
Long-term records arrangements confirmed			
Remaining follow-up and contacts clear			

Suggested status terms: Not started / In progress / Submitted / Accepted by responsible reviewer / Not applicable with reason.

Remaining conditions	Item, responsible participant, target date and required evidence
Review confirmation	Names, roles and dates of the appropriate reviewers

Adapted from the roadmap's Close Out Phase. [1] This is a coordination aid, not a certificate of occupancy, technical certification, contractual acceptance form or guarantee of completeness.

SOURCES / PUBLICATION SCOPE

How this guide was developed

The roadmap provides the lifecycle. The guide adds a practical operating method for evaluating and using software around that lifecycle.

Source 1 | myFacilities Project Management Roadmap

myFacilities one-page lifecycle reference, "MF Roadmap-Project Management (3).pdf." The guide preserves its four phase names and the responsibilities for planning, professional coordination, budgets, scheduling, documents, delivery reviews, reports and closeout. Phase-specific references in the guide point to this source.

Source 2 | myFacilities public product information

Homepage, reviewed October 12, 2026. Used for the high-level description of project-management software, the connection to wider facility workflows and the published contact route. Visit the source

Public descriptions establish product positioning, not independently measured customer outcomes or a complete feature specification. This guide does not present customer savings claims, adoption counts, testimonials or unverified case-study results.

How the source was interpreted

Bidding responsibilities. The source repeats the Pre-Construction task list in the Bidding Phase. That structure is retained as a repeat planning review rather than replaced with a different procurement workflow.

Accounting-related wording. The source uses the abbreviation "Construction Acc. System" without defining it. This guide recommends reviewable cost records but does not infer a native accounting system or integration.

Document storage. The source specifies "Permanent Document Storage." The guide retains the long-term handover objective while directing readers to confirm actual service and retention terms.

What this guide adds

The decision checkpoints, working record structures, school-calendar questions, review routines, pilot plan, performance measures and worksheets are original recommended practices for this guide. The renovation walkthrough is expressly illustrative. None is presented as a measured customer result, a regulatory requirement or a guarantee that a particular product configuration automates the entire process. Software capabilities and professional project-management responsibilities are not interchangeable.

Project participants remain responsible for applicable professional judgments, approvals and requirements. Confirm product scope and operating responsibilities with myFacilities and the appropriate district advisers before implementation.

Published by myFacilities | October 2026 | Guide edition 1.0
Copyright 2026 myFacilities. Districts may reproduce the included worksheets for internal project planning with attribution.

YOUR NEXT PROJECT

Bring it into focus.

A clearer plan.
A more coordinated team.
A better-informed district.

Bring one real project to a myFacilities demonstration. Walk through the information, responsibilities and review routine your district needs.

Request your project-management demo

admin@myfacilities.us

myfacilities.us

Build with a plan.
Manage with confidence.

The myFacilities approach to school construction.

myFacilities / PROJECT MANAGEMENT

