

Using an Owner's Advisor

Among the questions being asked today with collaborative delivery projects are those relating to that of an Owner's Advisor. In the WDBC Education and Training Sessions, this topic is one of continuous interest. Some core questions to ask include:

- Does the organization have sufficient management, staffing and technical resources and expertise to plan, procure, and manage their future collaborative delivery project?
- Alternatively, are outside support and additional resources needed, specifically in the form of an owner's advisor (or advisory team)?

There are a variety of reasons an owner may need to consider engaging additional resources to assist the organization's staff with the collaborative delivery project. These include project planning, procurement and implementation. Needs such as these may be the result of budgetary limitations and staffing cutbacks, owners facing challenges of insufficient technical expertise or perhaps other in-house resources to plan, procure, and deliver capital-improvement projects. Even with smaller capital projects, owners must respond to multiple complex demands—ranging from complying with regulation changes to meeting increased demand, compiled with the need to rehabilitate and renew existing assets on an expedited delivery schedule.

Definition

An owner's advisor (OA) is an individual or firm with expertise in planning, procuring, and managing collaborative-delivery projects that can provide essential guidance, direction, and advice to an organization. Depending on the owner's needs and project demands (defined at the organization and planning stage) the OA—and potentially the OA's team members—provides a wide range of technical resources and expertise. It is important to note, however, that an OA never assumes the owner's management role in decision-making.

In determining whether to use an OA, an owner takes into consideration the project's characteristics, level of complexity and envisioned delivery approach, as well as the owner's own organizational capabilities and any scheduling concerns or requirements. Based primarily on the specific project and the owner's organizational needs, OA's services often encompass support for project planning, delivery-method analysis and developing the draft project-implementation plans. Other services may include financial planning and funding support, procurement assistance, contracting and legal support, project controls and reporting, design and construction oversight, regulatory permitting, land acquisition, and public outreach assistance. The OA can also represent the owner's interests with regulatory agencies, designers, contractors, and the public.