

# COGENCE Alliance

Owners + Architects + Engineers + Contractors

*Inspire. Educate. Unite.*





# Mission + Purpose

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**Cogence** *(Latin)*

**“To drive together” or “Thinking that is well organized”**

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The purpose of the Alliance is to bring Owners and Developers, Architects and Engineers, Construction Managers and Contractors, and Allied Industry Professionals together to **advocate** and be a **resource** for improved project delivery.

For more information visit us at [www.cogence.org](http://www.cogence.org)

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# Growth Objective

Create industry wide focus on collaboration to improve project delivery.







# How will we Grow? Continue doing what is working:

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- Stay true to our mission
- Foster engagement
- Focus on Roundtables
  - » Attendance and participation
  - » Maintain open dialogue format
  - » Develop topics applicable to all
- Keep a balanced voice
- Gain industry attention
- Break down barriers
- Provide access to resources





# How will we grow? Increase our focus on:

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## Learning from other Industries

## Broadening our reach

### » Markets

- Increase diversity of partnership: Building Industries
- Include Developers
- Geographic locations: Develop criteria for expansion

### » Depth of Industry

- Those who put “barriers” in place
- Trade

## Balance and intention





# What's Happening: Chapters

- **Northwest Ohio**
  - » Ownership Outreach
- **Central Ohio**
  - » Next Program: 17 July 2019

## Central Ohio Program #2:

### RISK RANKING

ARCHITECT	OWNERS	CM'S	TRADES	ENGINEERS	AFFILIATES
COMMUNICATION	BUDGET	TEAM MEMBERS	TEAM MEMBERS	COMMUNICATION	COMMUNICATION
BUDGET	COMMUNICATION	CONTRACTS	SCHEDULE	CHANGES	LEADERSHIP
CONTRACTS	LEADERSHIP	BUDGET	COMMUNICATION	CONTRACTS	CONTRACTS
SCHEDULE	FINANCIAL	COMMUNICATION	LEADERSHIP	SCHEDULE	DUE DILIGENCE
LEADERSHIP	QUALITY	SCHEDULE	CONTRACTS	BUDGET	SCHEDULE
FINANCIAL	SCHEDULE	LEADERSHIP	CHANGES	QUALITY	CHANGES
TEAM MEMBERS	CONTRACTS	QUALITY	FINANCIAL	LEADERSHIP	TEAM MEMBERS
QUALITY	TEAM MEMBERS	FINANCIAL	QUALITY	DUE DILIGENCE	QUALITY
CHANGES	CHANGES	CHANGES	BUDGET	TEAM MEMBERS	FINANCIAL
DUE DILIGENCE	DUE DILIGENCE	DUE DILIGENCE	DUE DILIGENCE	FINANCIAL	BUDGET

FINAL RANKED RESULTS
COMMUNICATION
CONTRACTS
LEADERSHIP
SCHEDULE
BUDGET
TEAM MEMBERS
CHANGES
FINANCIAL
QUALITY
DUE DILIGENCE





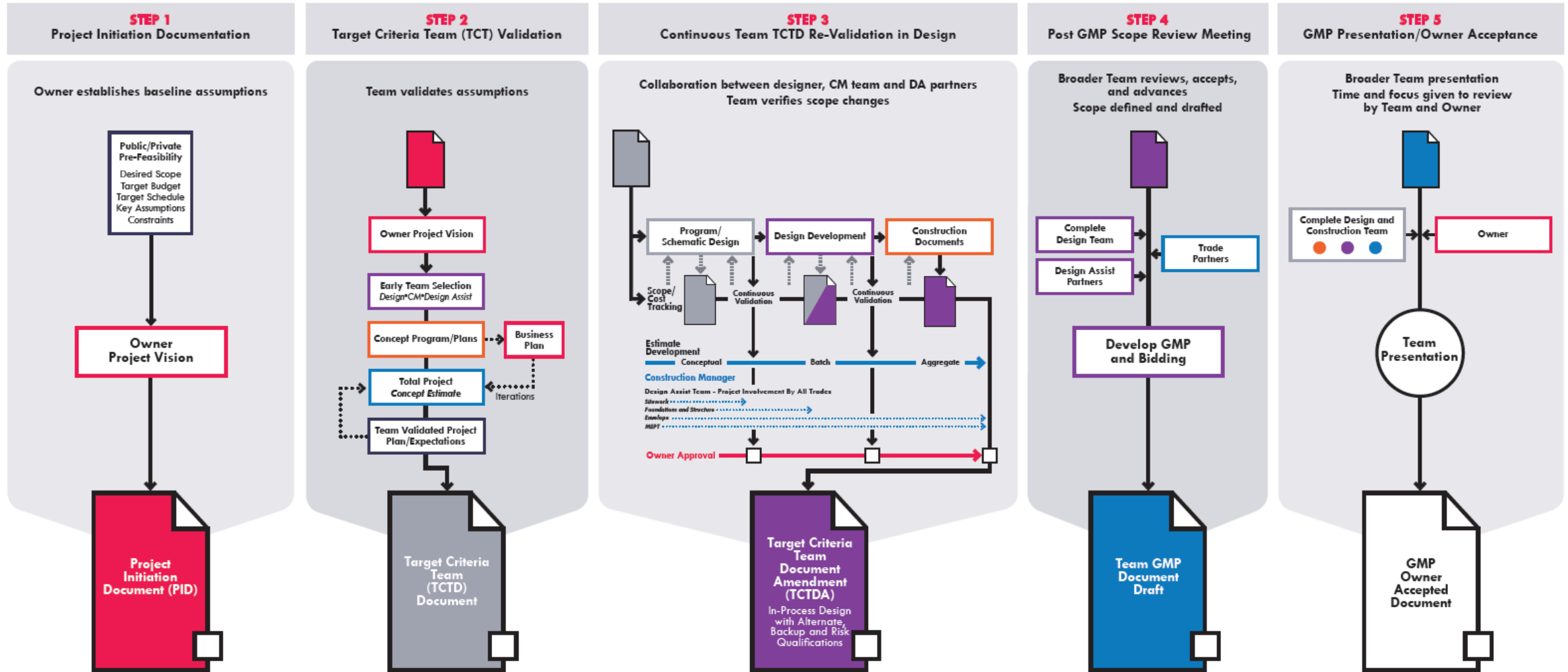
# What's Happening: Emerging Leaders



*Inspire. Educate. Unite.*



# Cogence GMP 5 Step Process



Trust and Collaboration throughout the Process through Team Building, Continuous Approval, and Accountability





# What's Happening: General

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- **Cogence GMP**
  - » Focus Group Review
  - » Educational Sessions: Summer 2019
- **2020 AI Summit/Town Hall**
- **Advocacy: Review of OFCC Design Build contract review**
- **Communication: Plan development**
- **Resource:**
  - » Capturing program content
  - » Sharing case studies





# What's Happening: Board

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- Executive Director Search
- Chapter Joint Committee Workshop & Outreach
- Exploring Expansion to Pittsburgh, PA



# Collaborative Scheduling “Why do it?”

8 May 2019



## Agenda

- Cogence – (5 Min)
- Introduction – (5 Min)
- Current State – (15 Min)
- Panel Discussion Stakeholder Input on Schedule – (75 Min)
- Future State - What is our deliverable?– (15 Min)
- Conclusion – (5 Min)



# Introduction





# Introduction

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## Goal Today:

### Defining Cogence Project Fundamentals

- Project Delivery
- Quality
- Schedule
- Budget – Future?



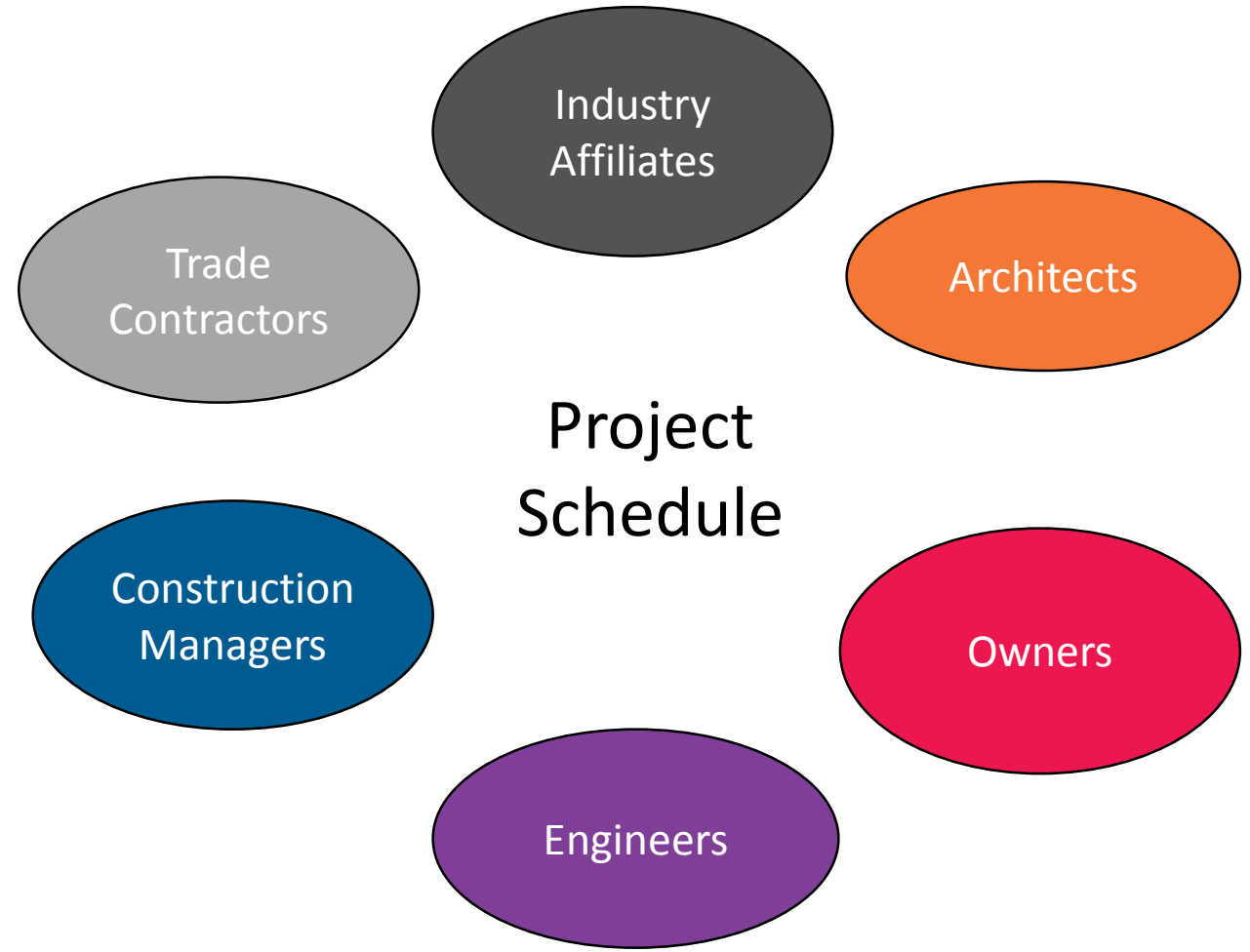


# Introduction

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## The Schedule Challenge: Unique Characteristics

- Project type/size
- Size of firms; Public/Private entities
- Project location
- On-boarding timeline
- Project delivery model
- Expertise of specific project team
- New team or repeat
- Aggressiveness of Budget/Milestones
- Market conditions



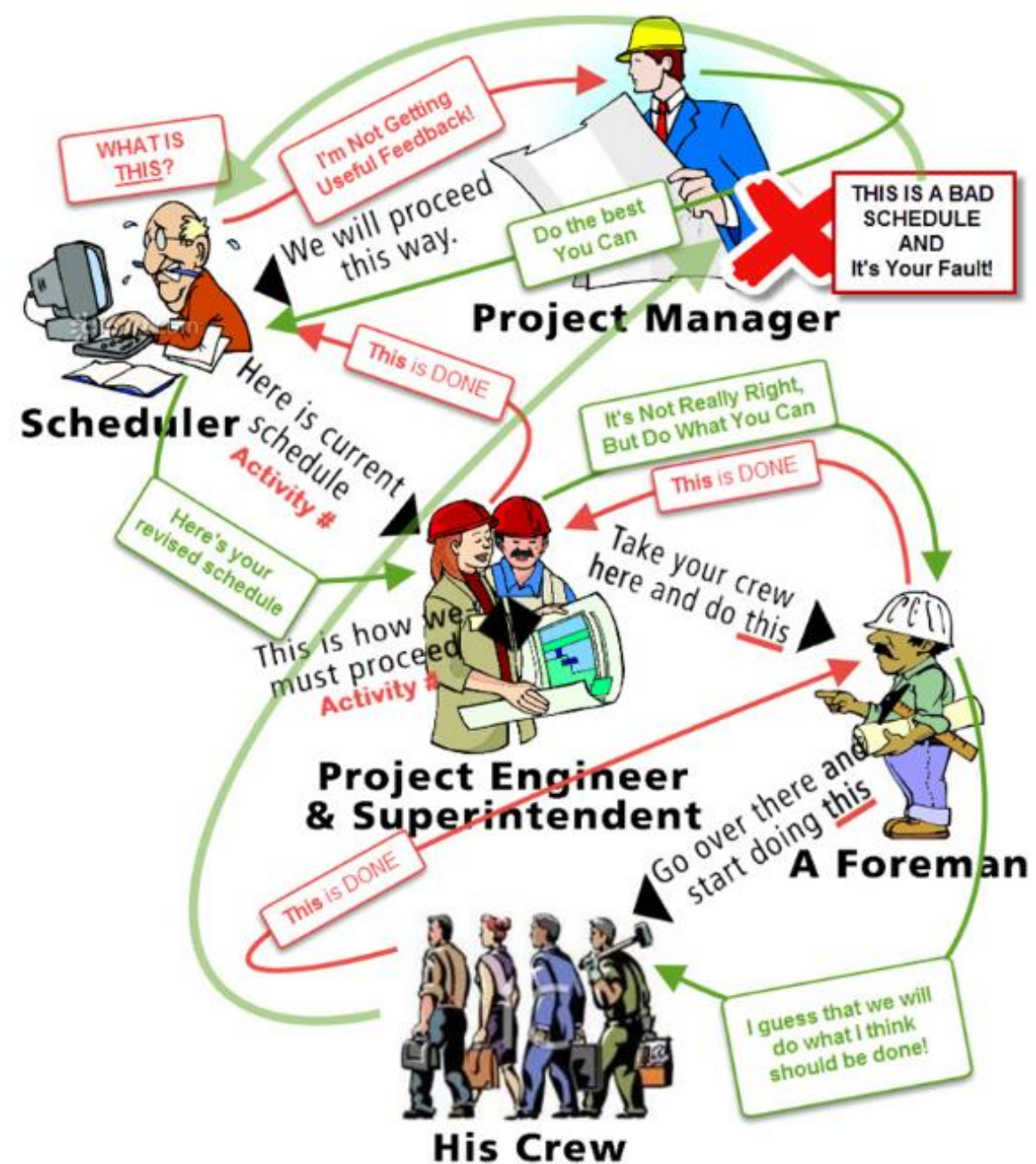




# Introduction

## Why do it? – Value proposition

- Direct Link to Profitability?
- Predictability?
- Staff welfare?
- Reputation?
- Insurance Policy?
- Risk to other projects?
- Maintain relationships / Future





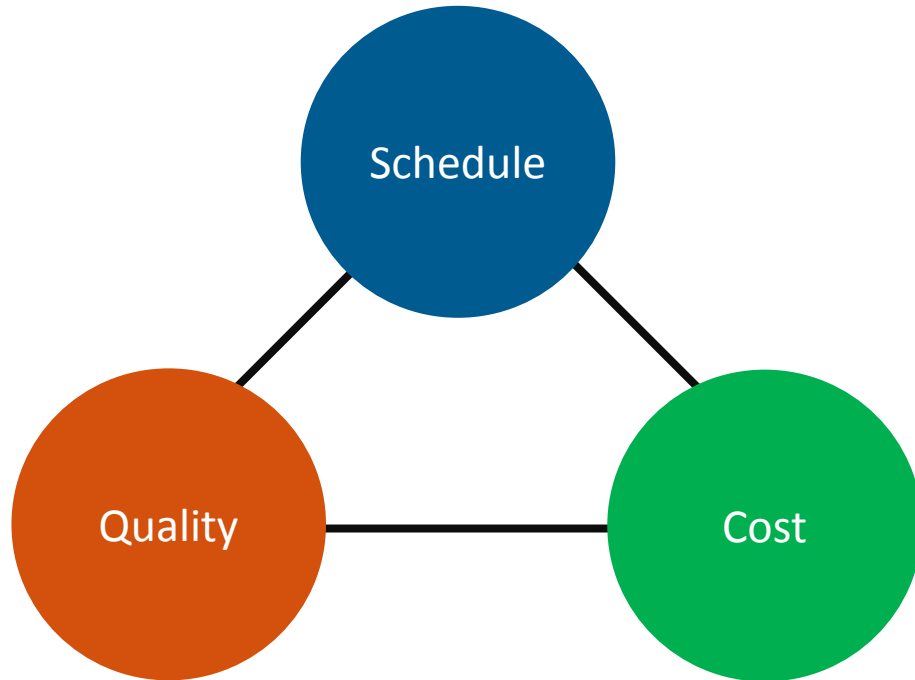


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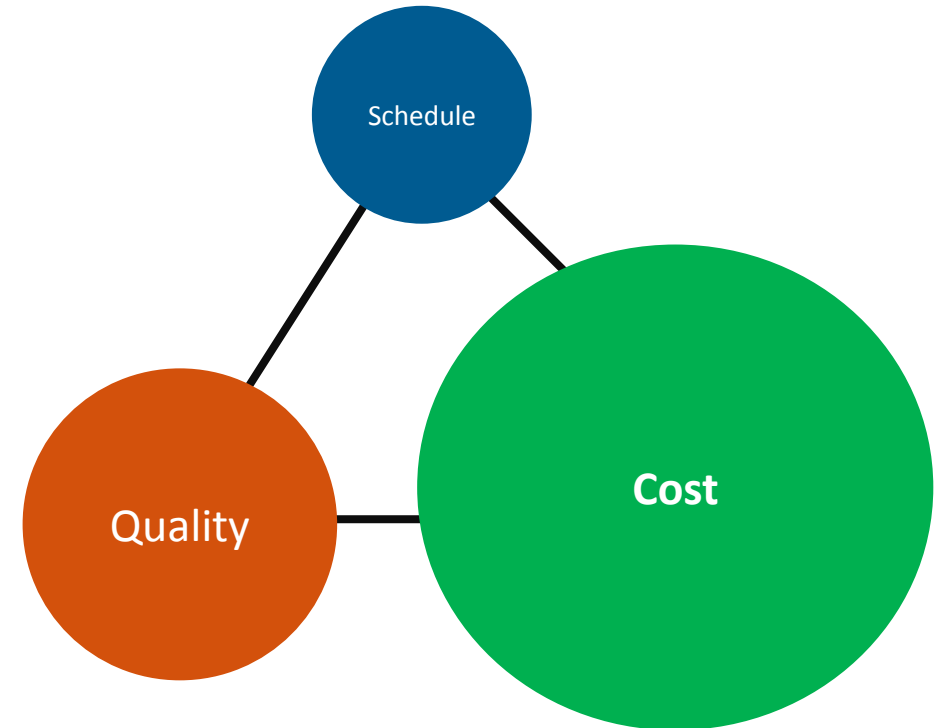
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## Project Management Triangle:

### Fundamental Expectation



### Fundamental Reality







# Current Scheduling Process “The Current State”

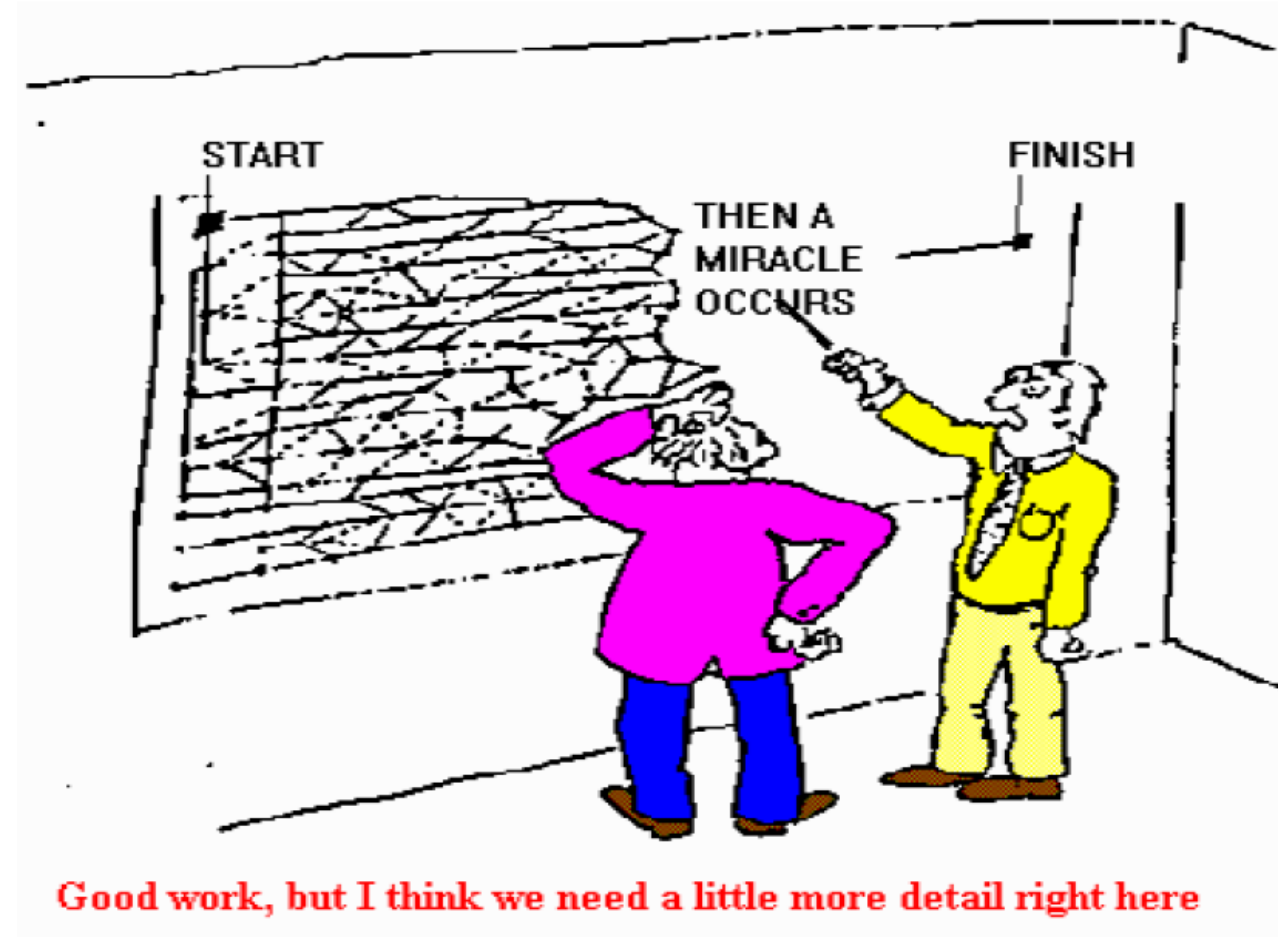




# The Current State

## Types of Schedules

- Level 1: Executive Summary / Milestones
- Level 2: Summary Master Schedule
- Level 3: Complete Project Coordination Schedule
- Level 4: Execution Schedule with Trade Input
- Level 5: Detailed Short Term Plans







# The Current State

## Life of a schedule

PROJECT DURATION  
↓

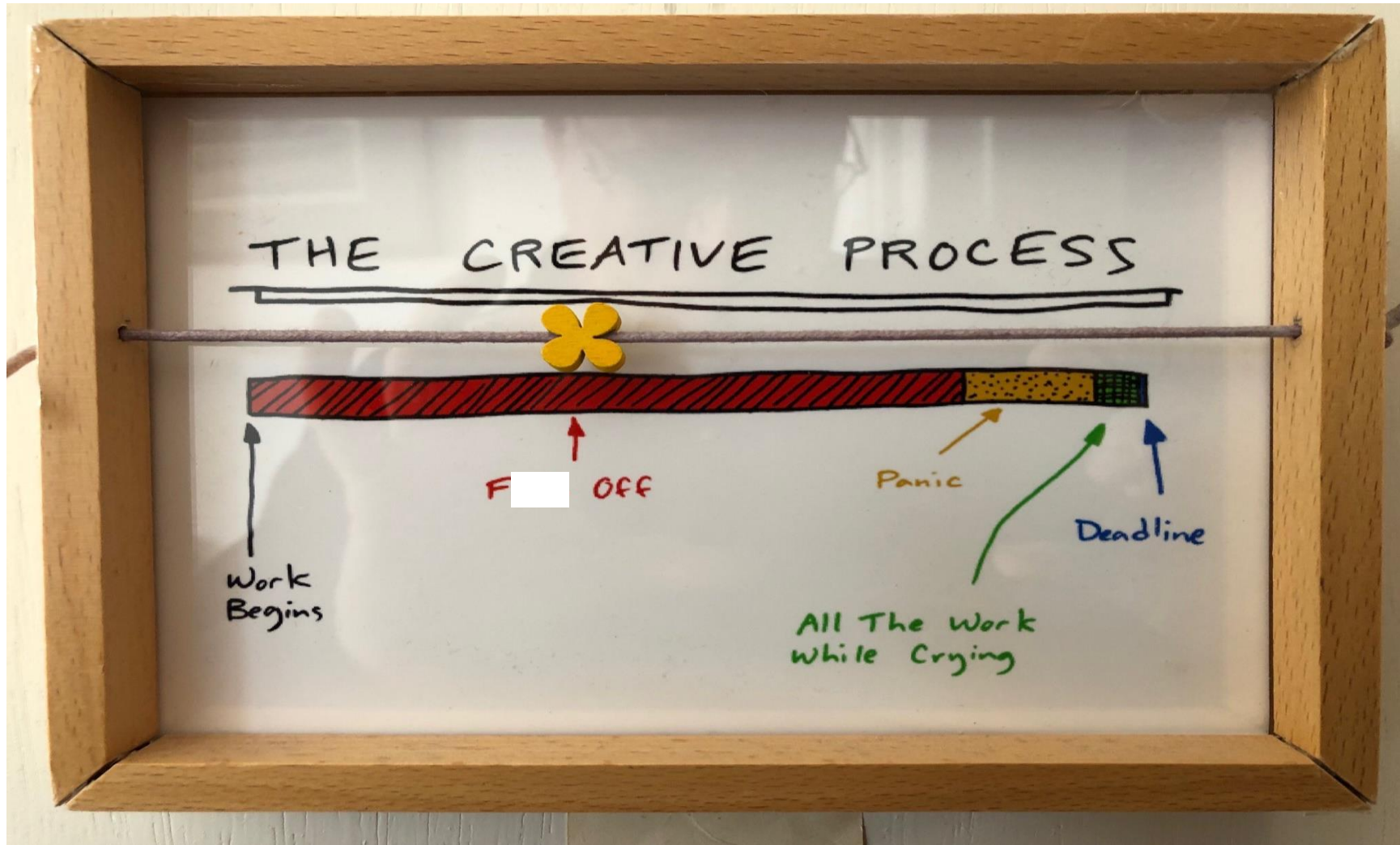
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# The Current State







# The Current State

Design/Pre-Construction

Construction

Construction Manager

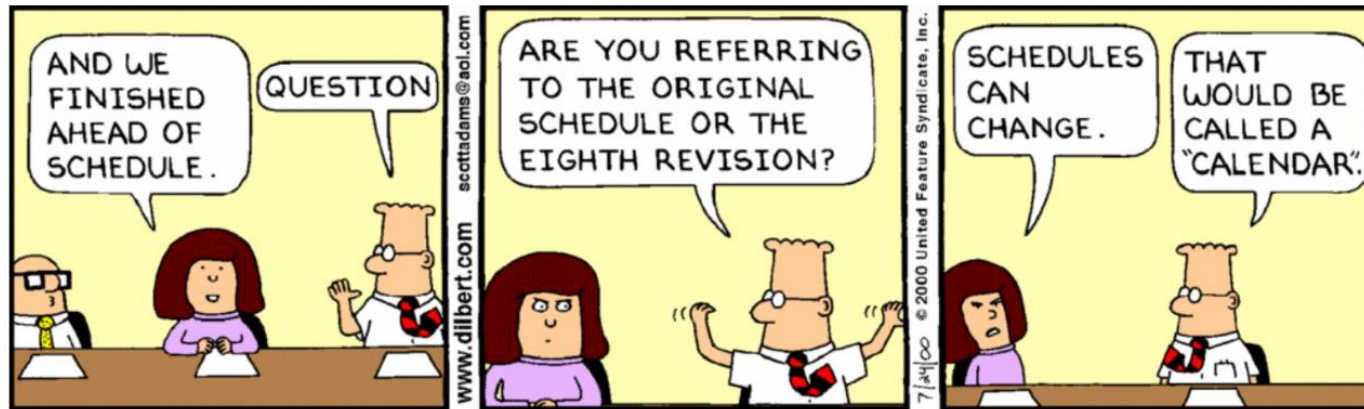
Engineers

Architect

Trade Contractors

Design Assist

Industry Affiliates



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# Panel Discussion

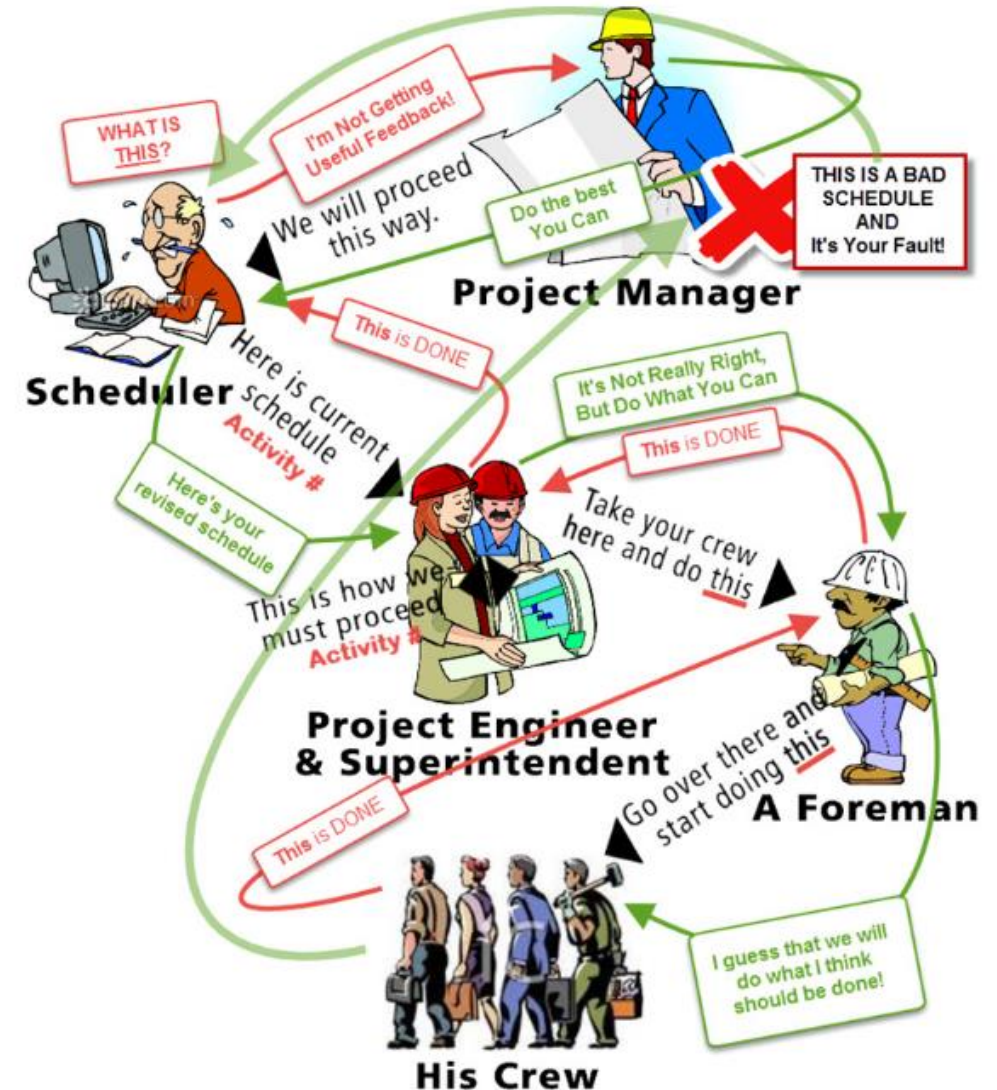




# Survey Approach

## Schedule Discussion Emphasis:

- Expectations vs. Reality
- Typical Process Gaps/Impacts
- Industry Trends: +/-
- Lessons Learned
- Success Stories
- Opportunities to improve with "Cogence" schedule guidance







# Panel Discussion – Topics

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- 1. Process Philosophy - ROI**
2. Team Expertise
3. Phase Expectations
4. Sharing/Transparency/Validation
5. Workflow/Execution
6. Accountability, Timeliness & Accuracy
7. Monitoring / Feedback Loop
8. Adapting to Change





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# Panel Discussion – Topic 1

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## Process Philosophy – ROI (**Profitability / Efficiency**)

- Do you agree that development of a quality schedule and efficient execution of work is critical for profitability and project team employee morale?
- Do you feel enough focus is placed on assigning proper budget to a project to fully meet project schedule requirements
- How important is it for the leadership to set the tone and culture in regard to supporting an environment where schedule process matters?





# Panel Discussion – Topic 1 *(Continued)*

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## Process Philosophy – ROI (**Limit Exposure if Problems Arise**)

- Do you agree that maintenance of a quality schedule throughout the project (reflecting changes and deviations from planned performance) is likewise critical?
- Do you ever feel important proactive schedule impact discussions are tabled in fear of potential cost ramifications from trades?
- How many project meetings have you sat in where the majority of participants have not reviewed the current schedule or sat silent in due to disagreement?





# Panel Discussion – Topic 2

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## Team Expertise

- Do you agree that the industry is struggling with issues about schedules/planning controls expertise? Do you agree that the requirement for a standard certification (such as a PSP) may help in ensuring that proper expertise is employed in the effort?
- Can you tell on a project who is the dedicated resource with schedule being #1 priority? How important are the following with this role:
  - Proper skillset/competency
  - Continuity
  - Relevant experience
  - Soft skills to drive process
  - Continuous Improvement Mindset





# Panel Discussion – Topic 3

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## Phase Expectations (Design Phase)

- Do you feel expectations for design phase planning and scheduling are well defined?
- What requirements have resulted in greater transparency of the design team progress/constraints? Avoid hearing a few weeks before a milestone that a few more weeks is needed. (Are CD's ever 100%)
- What are typical participation expectations for each stakeholder in development of 1<sup>st</sup> Baseline Schedule?





# Panel Discussion – Topic 3 (Continued)

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## Phase Expectations (Construction Phase)

- How common is that teams struggle with the ‘Basics’? How do you know when the baseline has been accepted by all stakeholders?
- Do you feel there should be more transparency to the progress information flow for routine updates?
- Have you seen issues with date driven schedule milestones putting pressure on collaborative pull planning schedule processes?
- Have you experienced the value of resource manpower loading
  - To clarify the original plan in terms of workflow
  - To serve as a metric to evaluate planned performance
  - To serve as a tool to assess changes (e.g. minimize / avoid stacking)





# Panel Discussion – Topic 4

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## Sharing/Transparency/Validation

- What is typical responsiveness observed by each stakeholder to reporting/feedback requirements.
- Do you keep close track of how and when update releases are shared with the full team and how feedback given is integrated?
- How do you ensure the progress reflected in the schedule is accurate?
- Do you feel there is a lack of project documentation required to fully assess any issues when they occur, hindering contemporaneous avoidance or timely resolution of any related disputes?





# Panel Discussion – Topic 5

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## Workflow/Execution

- How concerned do you become once you notice the schedule is not being used as an active tool for executing work/workflow
- What is the long term impact of trade workforce shortage environment. Is keeping best people efficient a solution that needs more focus?
- Utilization of weekly work planning to execute work?





# Panel Discussion – Topic 6

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## Accountability, Timeliness & Accuracy

- Do you feel more emphasis needs to be placed on teaching the practice of making and receiving reliable commitments?
- Who typically is holding the team accountable to keep team focused on delivering the schedule development and updating expectations timely?
- Do you feel penalty provisions need to be included in specifications with respect to timeliness/Accuracy in the scheduling process in order to encourage compliance and accountability?





# Panel Discussion – Topic 7

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## Monitoring / Feedback Loop

- Do you feel there is increased accountability for all stakeholders and focus when a 3<sup>rd</sup> party is “checking under the hood” for accountability/conformance to processes for project duration?
- Does performance improve when KPI’s are actively being monitored and shared with full project team?
- Is there typically issue addressing schedule problems timely once identified?
- Do you feel there is a lack of project documentation available when issues occur to settle disputes





# Panel Discussion – Topic 8

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## Adapting to Change

- Do you feel better resource and schedule information should be provided with each change to enable efficient evaluation and timely reflection in schedule updates?
- Do you feel that at times extended overtime is employed to recover schedules without regard to the “point of no ROI”?
- Do you hear more commonly the use of the “No extra manpower available” reason that makes it more difficult (or impossible) to make up for lost time due to workflow inefficiency? Do you feel that explicit schedule time contingencies should be employed as a resource to offset some issues?





# Panel Discussion

SCORE CARD						
COMMON PROBLEM			IMPACT ON OUTCOMES			
	Often	Sometimes	Rarely		High	Low
1						
2						
3						
4						
5						
6						
7						
8						





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# Future Scheduling Process “The Future State”





# The Future State

## Life of a schedule

**PROJECT SCHEDULE** →

PROJECT DURATION

1. OWNER BUSINESS CASE TIMELINE REQ'MTS (L1)
2. ARCHITECT/CM CONTRACTURAL SCHEDULES (L2)
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# The Future State

## Planning together!



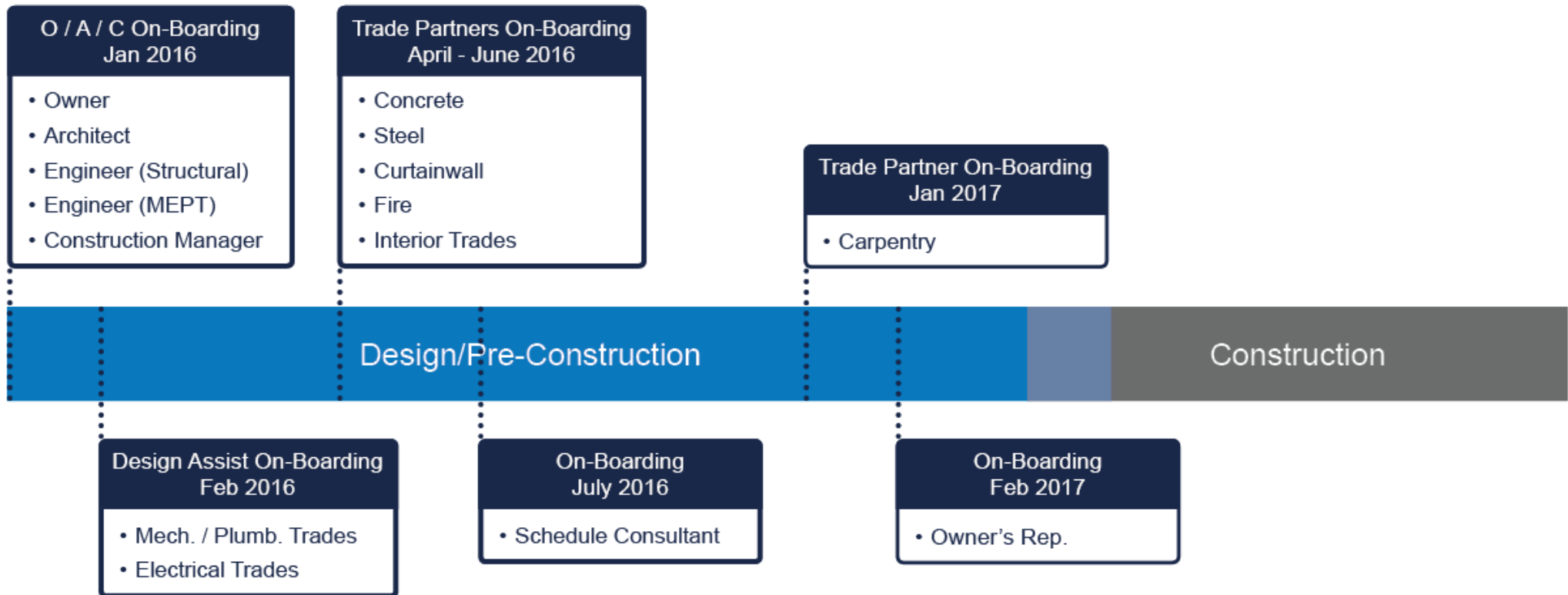
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# The Future State

- An Example







# The Future State

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Planning together!

Design/Pre-Construction

Construction

**Construction Manager**

**Engineers**

**Architect**

**Trade Contractors**

**Design Assist**

**Industry Affiliates**

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# The Future State

	Programming/Concept	DESIGN PHASE			BIDDING	CONSTRUCTION	ACTIVATION	CLOSEOUT
		SD	DD	CD				
<b>Master Schedule</b>	Business Case Go-Live	Milestone	Milestone	Milestone	Milestone	Milestone	Milestone	Milestone
<b>Responsibility</b>	Owner	Owner, A/E, CM	Owner, A/E, CM	Owner, A/E, CM	CM	Owner, A/E, CM	Owner	Owner
<b>Frequency</b>	Monthly	Monthly (Small Projects Weekly)	Monthly (Small Projects Weekly)	Monthly (Small Projects Weekly)	End of Phase	Monthly	Monthly	As needed
<b>Detailed Schedule</b>		Phase Plan - Design	Phase Plan - Design	Phase Plan - Design	Phase Plan	Phase Plan	Phase Plan	
<b>Responsibility</b>		A/E	A/E	A/E	CM	CM	Owner	
<b>Frequency</b>		Weekly	Weekly	Weekly	Weekly	Weekly	Weekly	
<b>Execution</b>	Monthly Coordination Meeting	Weekly Coordination Meeting	Weekly Coordination Meeting	Weekly Coordination Meeting	Weekly Coordination Meeting	Weekly Coordination Meeting	Daily Coordination	
		Active Constraint Log (PPC)	Active Constraint Log (PPC)	Active Constraint Log (PPC)	Active Constraint Log (PPC)	Active Constraint Log (PPC)		
		6-wk Look-Ahead	6-wk Look-Ahead	6-wk Look-Ahead	6-wk Look-Ahead	6-wk Look-Ahead		
		Co-Location Begins					Co-Location Ends	
<b>On-Boarding</b>	Architects/Engineers	CM On-Board	Key Trade Contractors On Board			Remaining Trade Contractors on Board		
	Schedule Consultant (3rd Party Audit/Spec)	D-A On-Board						
		Owner Rep						
		Industry Affiliates						





# Conclusion

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- Outcome based upon score card
  - Collaborative scheduling leads to what?
- Audience participation on reaction of todays presentation.
- What can Cogence do to create a collaborative schedule?
- Final thoughts?





# Plus / Delta

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**Plus (+)**

**Delta (-)**



# Next Program: Eliminate Waste

Bring an Owner

10 July 2019