

# 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”**

---

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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# *How Can You Help **COGENCE?***

*tocrowley@brewer-garrett.com*

1

*Serve on a Committee*

2

*Participate in Developing a Round Table Event*

3

*Become a Mentor for our Emerging Leaders*

4

*Share Your Voice*

5

*Promote COGENCE*

*Inspire. Educate. Unite.*

***(INSERT SLIDE ABOUT A3 HERE)***

## 2021 Theme: INFLECTION POINTS – The Moments that Define a Project

- March 24: Project Kick-Off
- May 26: GMP / Design Sign-Off
- July 28: Start of Construction
- September 22: Changes in the Work
- November 11: Post-Occupancy Review

## Agenda

- 🌀 President's Introduction
- 🌀 Program Introduction & Survey Results
- 🌀 Presentation 1: Sean McDermott
- 🌀 Presentation 2: Brenden Shea
- 🌀 Breakout
- 🌀 Breakout Results, Summary, and Takeaway
- 🌀 +/-Delta

# Project Kick-Off

24 March 2021

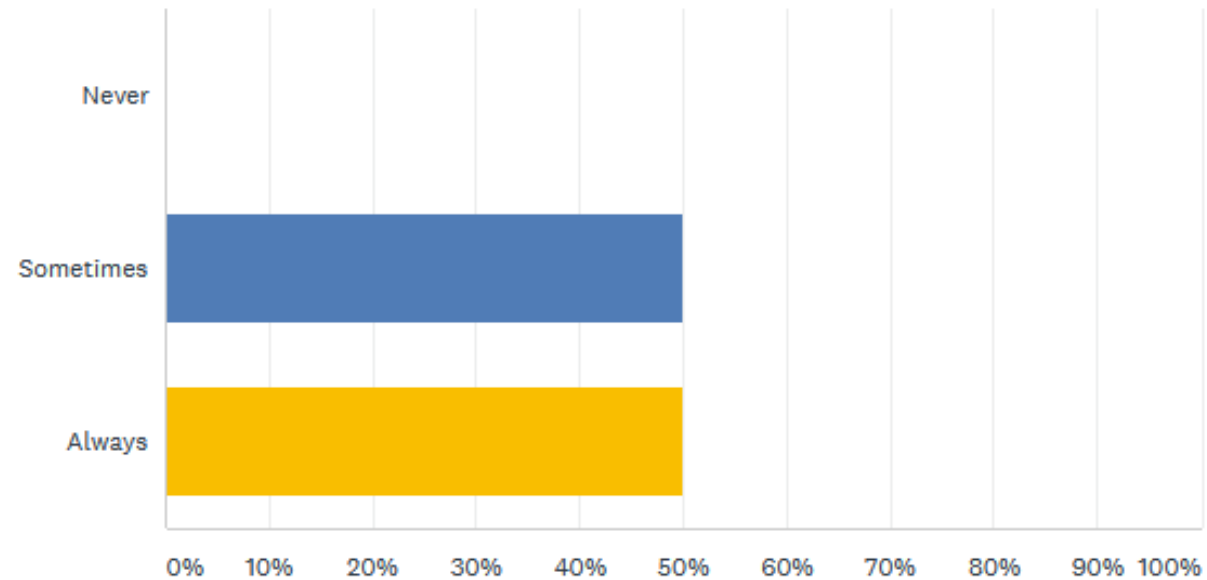


Q1



How often do your projects have an overall project kick-off event?

Answered: 26 Skipped: 0

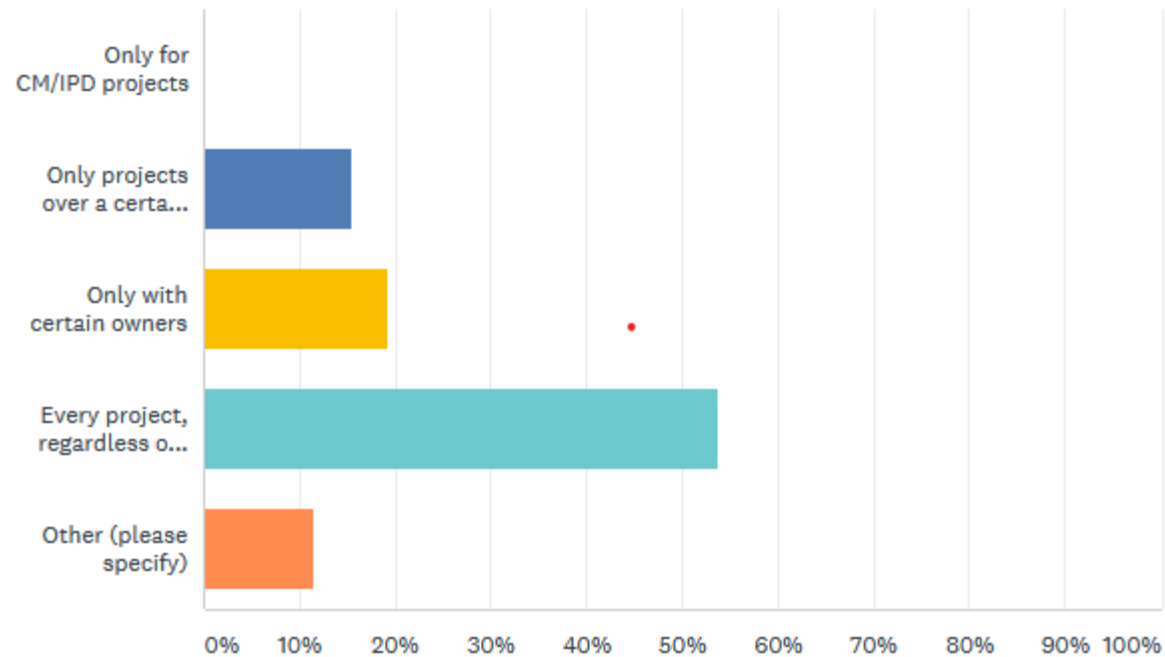


Q2



What are the criteria that determine if a project should have a kick-off?

Answered: 26 Skipped: 0

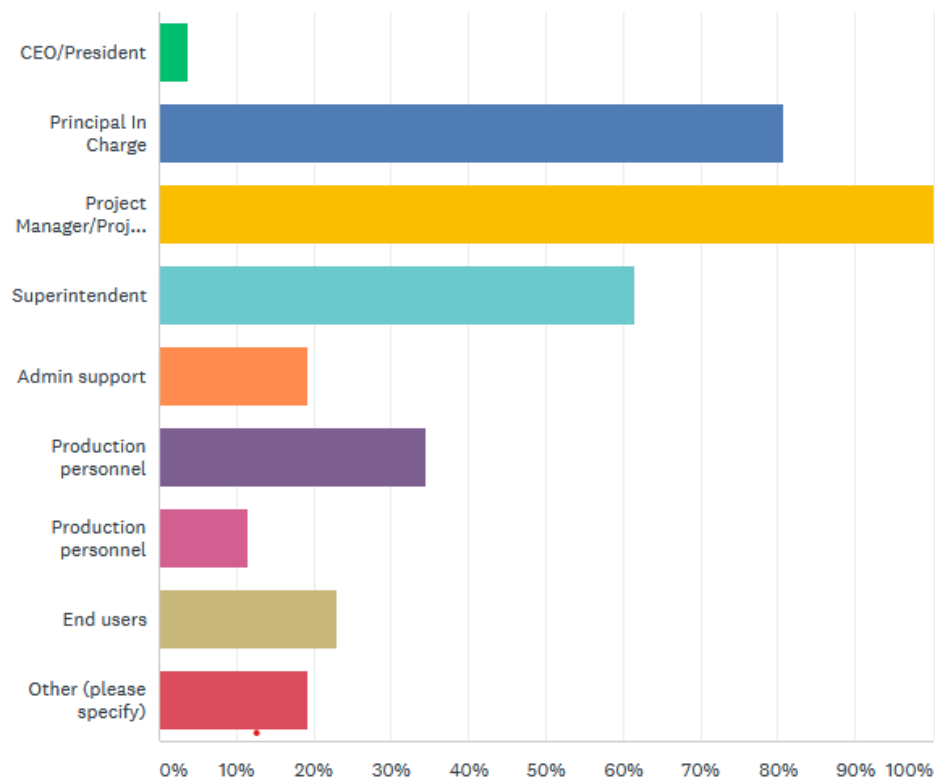


Q3



Who attends your project kick-offs? (Not just which organization, but what role in the organization, e.g. firm principal-in-charge, project manager, etc.) Choose all that apply.

Answered: 26 Skipped: 0



Q5



What is your personal goal or best outcome for a kick-off?

Answered: 26 Skipped: 0

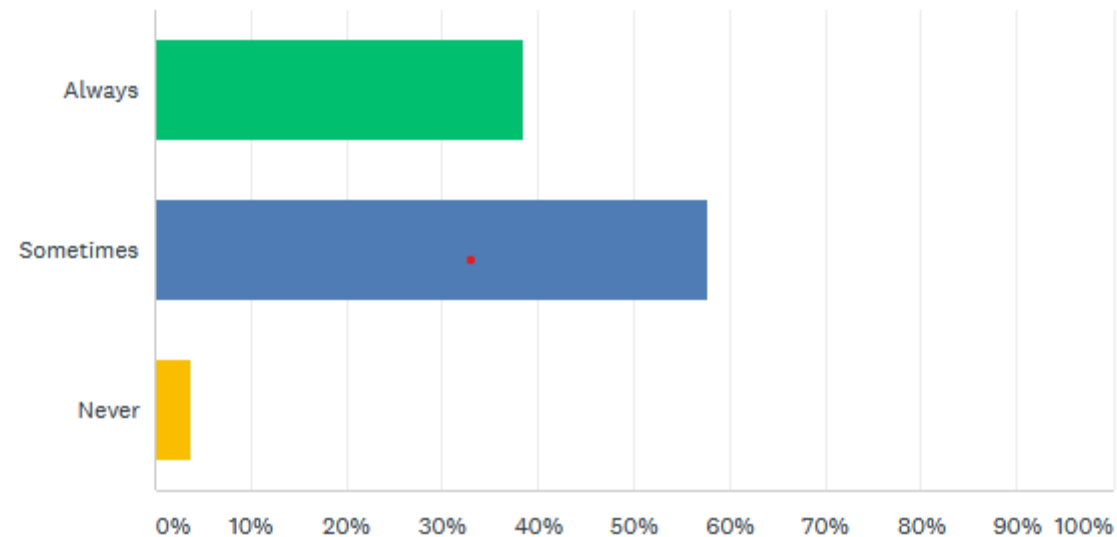
- A team that understands the project scope and timeline
- All stakeholders on the same page
- Confidence and trust is established between the owner and the project team
- Project expectations are set
- Clear direction
- Understand communication flow
- Happiness

Q6



How often do you revisited take-aways from the kick-off with the team later in the project?

Answered: 26 Skipped: 0



Q7



What is the most surprising or enlightening thing that came up in a kick-off for you and changed your approach to the project

Answered: 22   Skipped: 4

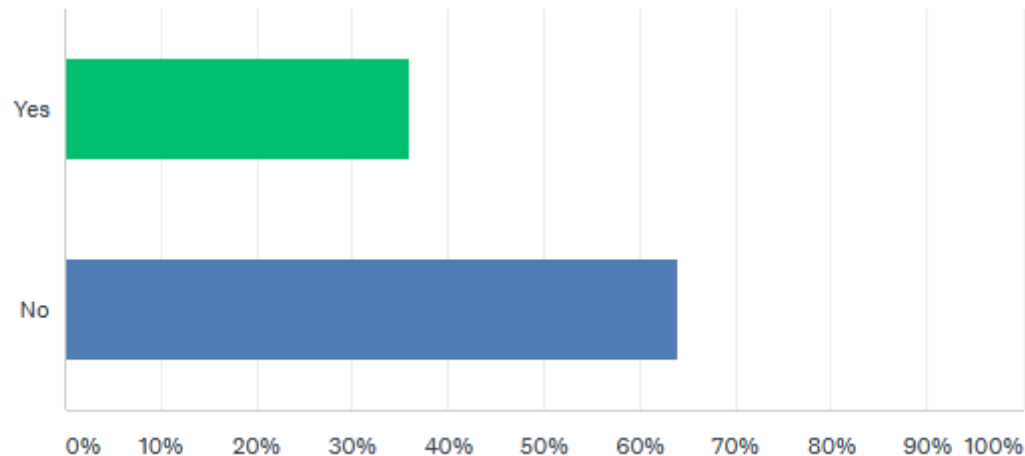
- The value that subcontractors bring to the discussion
- Differences in scope/schedule/budget goals
- Team members being honest about their strengths/weaknesses
- Contractor changes sequences to accommodate other trades
- Owner's goals that were not stated in the RFP
- Changes that have occurred since the RFP
- That stakeholders did not understand design and construction stages/process

Q8



Do you identify the cost of kick-offs and other project coaching/facilitation events separately in the cost of a project?

Answered: 25 Skipped: 1

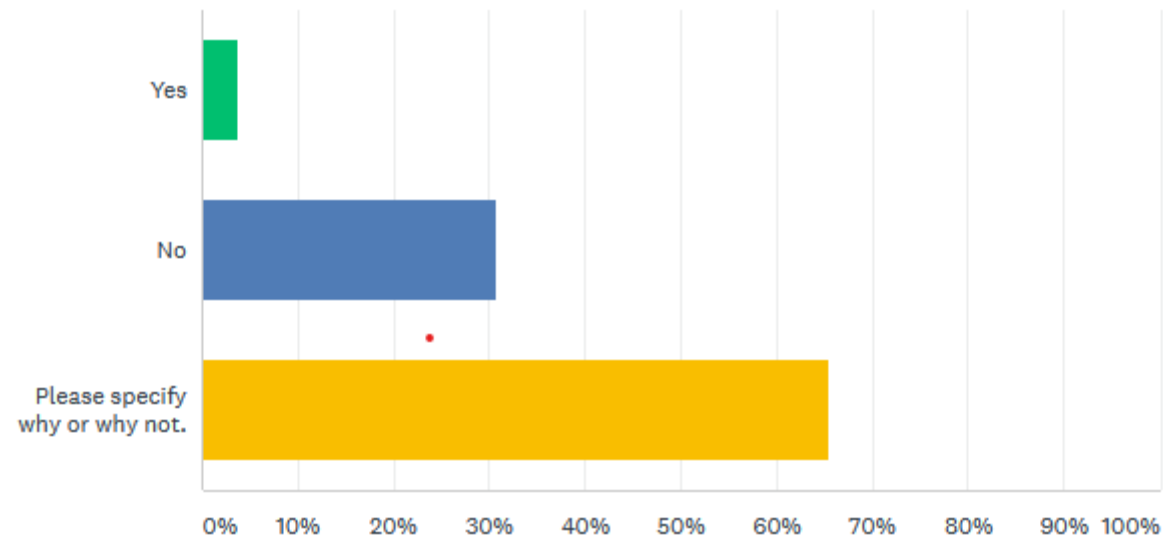


Q9



Do you use an outside facilitator for kick-offs and project coaching/facilitation? Why or why not?

Answered: 26 Skipped: 0





- **Hadn't thought of having outside facilitator**
- **Prefer to have owner control process**
- **Typically the only projects that have an outside facilitator is an IPD type project. Most of the time it is a PM or Project exec that leads the discussion.**
- **That would overly formalize the event**
- **Its project management 101. If our team can't host a kickoff, I would worry about the future of the project**
- **Cost to project, owners typically don't typically want to go to that expense.**

# Sean McDermott

## Chief Planning and Design Officer

### Cleveland Metroparks

# The Kick Off *Before* The Kick Off

# The Kick Off *Before* The Kick Off

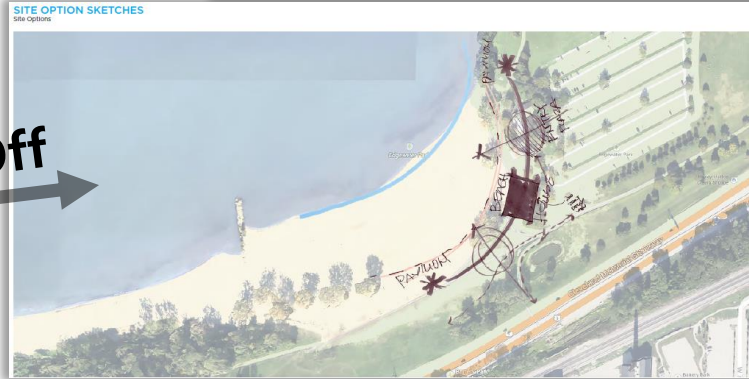
Kick Off →



Concept  
To  
Completion →



Kick Off →



Concept  
To  
Completion →



Kick Off →



Concept  
To  
Completion →



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# The Kick Off *Before* The Kick Off

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Kick Off

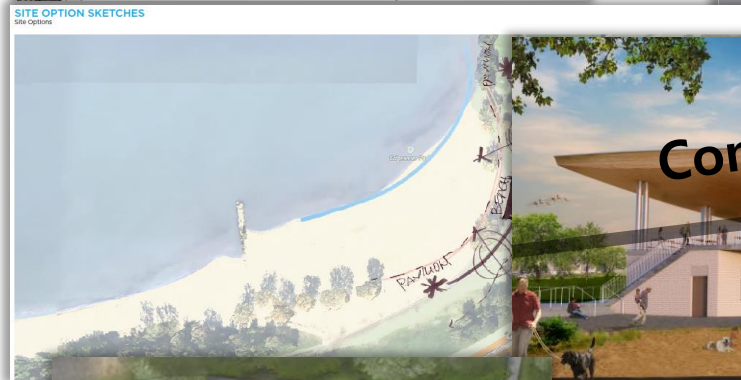
Concept  
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Completion

Kick Off

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Kick Off

Concept  
To  
Completion



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# The Kick Off *Before* The Kick Off

## Building a Process

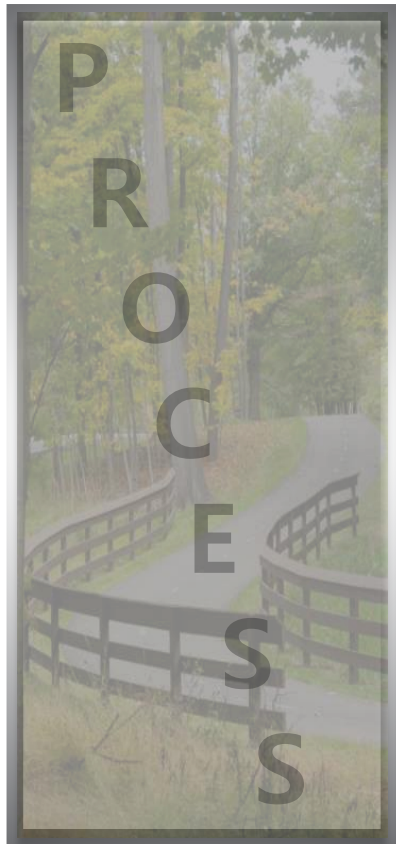


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# The Kick Off *Before* The Kick Off

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# Kick Off

## Project Development Manual Task and Responsibility Matrix

Updated: October 2018

Cleveland Metroparks

		Start Date	End Date	By	Notes	Responsibility											
		Project Conception, Planning and Pre-Design (PD)															
Phase	Task Description																
PD	Project Kick-off Meeting																
PD	Evaluate project needs and establish project team																
PD	• Internal stakeholders																
PD	• External stakeholders																
PD	Explore plans associated with, and regulations governing, the project site																
PD	• Master Plans, ADA and HIC/HP																
PD	• EPA, ACO, LBP, ESA 1 or 2																
PD	• Utilities																
PD	• Geotech																
PD	• Permits (State, USACE, ODNR, OEPA, Health, Liquor, etc.)																
PD	• Title Review																
PD	• Operations Impacts																
PD	• Special Considerations (FAA, ODOT, Political Considerations, Confined Spaces)																
PD	• Other Special Site Constraints or Due Diligence																
PD	Develop preliminary building/site program																
PD	Discuss anticipated project budget																
PD	Prepare project cost estimate and budget worksheet																
PD	• Soft Costs (engineering, permits, etc.)																
PD	• Construction																
PD	• Equipment																
PD	• PPE																
PD	• IT and AV																
PD	• Contingency																
PD	• Other																
PD	Project Funding																
PD	• Capital Funding																
PD	• Grants and Donations																
PD	• Other																
PD	Determine General Project Schedule																
PD	• Real Estate																
PD	• Design																
PD	• Cost Estimates																
PD	• Permit Processing																
PD	• Phasing																
PD	• Bidding																
PD	• Furniture and Equipment Ordering																
PD	• Construction																
PD	• Data and Security Hook-up																
PD	• Move-in																
PD	• Marketing & Events																
PD	• Staff																
PD	Determine Project Delivery Method																

# Building a Process

# Click Off



# The Kick Off *Before* The Building a Process

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3.3 SITE SELECTION.....
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6.2 PLAN DEVELOPMENT AND REVIEW.....

## 5.1 DESIGN-BID-BUILD

The Design-Bid-Build (DBB) method is the most traditional process. Design-Bid-Build is a linear sequence of activities, as its name indicates. Once the project has been conceived and planned, it goes through a design process (concept, schematic, design development, and construction documents), a competitive public bidding or quoting process, and then construction.

Benefits:	Limitations:
<ul style="list-style-type: none"> <li>• Widely known method</li> <li>• Well established roles and responsibilities</li> <li>• Effective in determining least cost</li> </ul>	<ul style="list-style-type: none"> <li>• Reliance that engineer's estimate is accurate to project and market conditions</li> <li>• Potential and unpredictable change orders</li> <li>• Over budget bid risks time delays and added design fees</li> <li>• Limited subcontractor quality control</li> </ul>

## 5.2 DESIGN-BUILD

The Design-Build (DB) method allows the owner to contract with a single firm, the design-builder, to design and subsequently construct the project. The tasks may be provided to the owner by a single firm, or through a team of firms. The distinguishing factor of this delivery method is that the design services are provided for the design-builder and not the owner, which can be very effective in controlling costs, speed and quality of a project.

The DB method is a "best value" method, meaning it is comprised of a selection process in which team proposals contain both pricing and performance components. The two step process allows for the award of contract to the proposal deemed most advantageous and of the greatest value to the Park District. The first step is focused on qualifications which include, but are not limited to: competence, past experience and performance, financial responsibility, and ability to meet goals and objectives. The second step involves proposals which include but are not limited to: fee-based pricing, schedule and approach, and value-added ideas. Once selected, design commences and a contract for pre-construction stage compensation is executed. Cost estimates are prepared throughout the design process to ensure the project is designed within budget, and then a Guaranteed Maximum Price contract amendment is executed for the construction stage compensation of the project. Reference Figure 6.1 for DB procurement procedures.

Benefits:	Limitations:
<ul style="list-style-type: none"> <li>• Qualification based selection</li> <li>• Compression of project schedule</li> <li>• Budget and cost control</li> <li>• Design control</li> <li>• Construction quality control</li> </ul>	<ul style="list-style-type: none"> <li>• Additional time required on front end</li> <li>• Bidding competition more limited</li> </ul>

## 5.3 CONSTRUCTION MANAGER AT RISK

The Construction Manager at Risk (CMR) method is similar to general contracting. While design documents are developed under a separate consultant contract held by the owner, the CMR is included from the beginning to advise on cost estimating and constructability. Come construction, the owner has a single prime contract with the CMR, and the CMR holds all of the subcontracts and can directly enforce all quality, scheduling and coordination obligations to the subcontractors.

CMR is also a "best value" method, meaning it is comprised of a selection process in which contractor proposals contain both pricing and performance components. The two step process allows for the award of contract to the proposal deemed most advantageous and of the greatest value to the Park District. The first step is focused on qualifications which include, but are not limited to: competence, past experience and performance, financial responsibility, and ability to meet goals and objectives. The second step involves proposals which include, but are not limited to: fee-based pricing, schedule and approach, and value-added ideas. Once selected, design commences and a contract for pre-construction stage compensation is executed. Cost estimates are prepared throughout the design process to ensure the project is designed within budget, and then a Guaranteed Maximum Price contract amendment is executed for the construction stage compensation of the project. Reference Figure 6.1 for CMR procurement procedures.

Benefits:	Limitations:
<ul style="list-style-type: none"> <li>• Qualification based selection</li> <li>• Compression of project schedule</li> <li>• Budget and cost control</li> <li>• Construction quality control</li> </ul>	<ul style="list-style-type: none"> <li>• Additional time required on front end</li> <li>• Bidding competition more limited</li> </ul>

## 5.4 CLEVELAND METROPARKS PLANNING & DESIGN LED GENERAL CONTRACTING

Planning & Design led general contracting (PDGC) is a method in which Cleveland Metroparks in-house project managers act as the general contractor. Individual contracts with external contractors and/or vendors are coordinated, scheduled, and managed by the in-house P&D project manager, eliminating a layer of outside management. These contracts may be bid or quoted using established procurement processes. Design services may be completed in-house, contracted with an outside consultant, or a combination of the two.

Benefits:	Limitations:
<ul style="list-style-type: none"> <li>• Budget and cost control</li> </ul>	<ul style="list-style-type: none"> <li>• Additional owner management required</li> </ul>

# The Kick Off *Before* The Kick Off

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### REQUEST FOR QUALIFICATIONS FOR PROFESSIONAL DESIGN SERVICES



**Cleveland  
Metroparks**

RFQu #6482

Professional Design Services for Cleveland Metroparks  
Gorilla Primate RainForest Addition

Cleveland Metroparks Zoo

ISSUED: January 10, 2020

QUALIFICATIONS SUBMITTAL DUE: February 7, 2020, 2:00 p.m. (EST)

# The Kick Off *Before* The Kick Off

## Building a Process

5.4 CLEVELAND METROPARKS  
5.5 IN-HOUSE CONSTRUCTION  
5.6 DESIGN-BUILD HARD B


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8.5 BOARD PRESENT

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9.2 CONSTRUCTION  
9.3 PROJECT CLOSURE

10. Communication

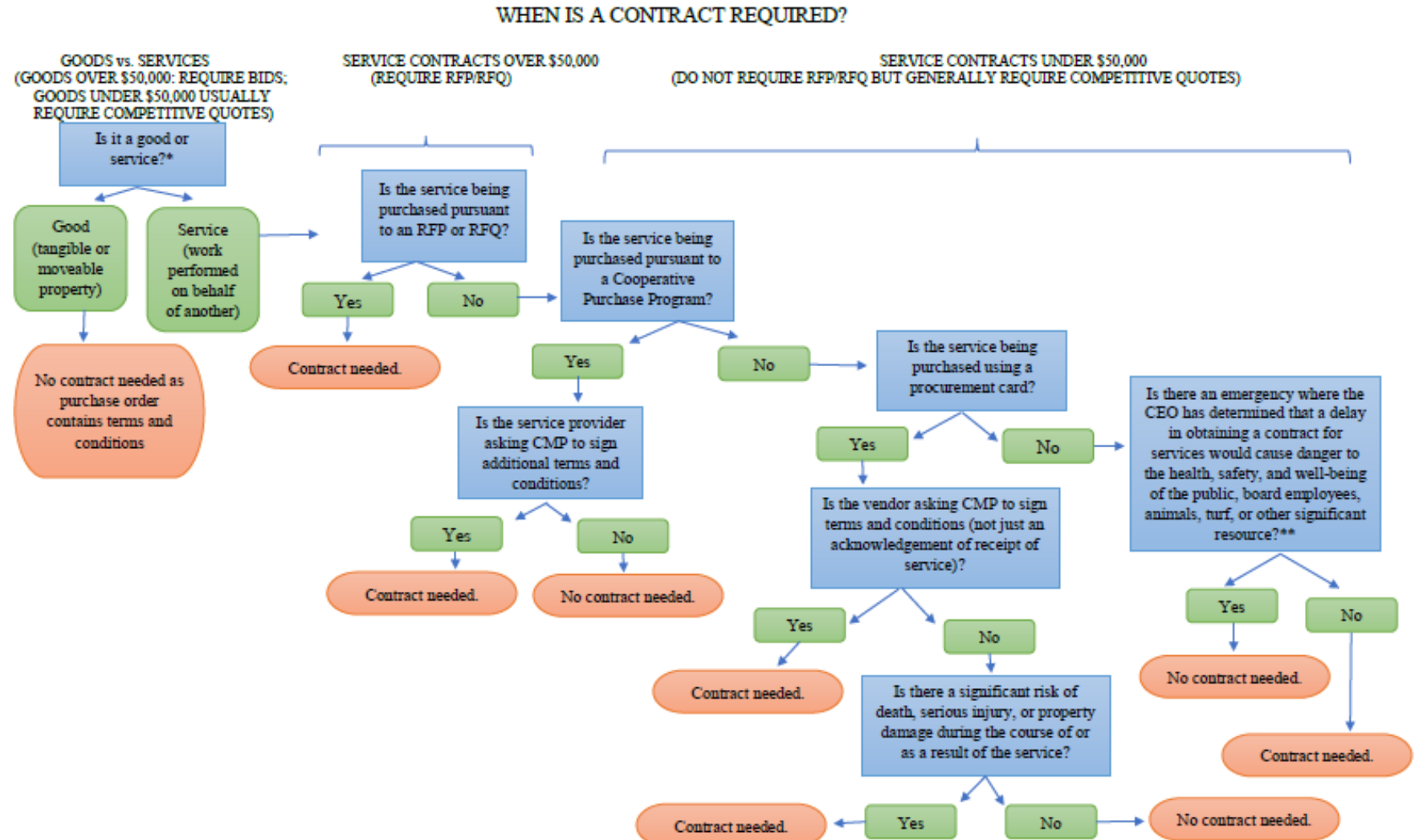
 <b>P&amp;D RFQu / RFP Procedures 8/1/20 - 7/31/21</b>					
PROJECT TYPE →	DESIGN SERVICES Less than \$50,000 on "Under 50" list	DESIGN SERVICES Less than \$50,000	DESIGN SERVICES Greater than \$50,000	CONSTRUCTION RFQu Design/Build or CMR	CONSTRUCTION RFP Design/Build or CMR <sup>6</sup>
TASK ↓					
Development of RFQu by:	Staff / Chief	Staff / Chief	Staff / Chief	Staff / Chief	Staff / Chief
Assignment of RFQu#:	Use "No. 6360"	Purchasing	Purchasing	Purchasing <sup>1</sup>	Purchasing
Approval of RFQu scope:	N/A	Chief	Chief & Legal Dept.	Chief & Legal Dept.	Chief & Legal Dept.
Legal Advertisement:	N/A	Department Admin	Department Admin	Department Admin	N/A
Review of RFQu Respondents	2 Person Panel <sup>2, 3</sup>	2 Person Panel <sup>2, 3</sup>	Minimum 3 Person Panel <sup>2, 7, 8</sup>	Minimum 3 Person Panel <sup>2, 5, 7, 8</sup>	Minimum 3 Person Panel <sup>2, 7, 8</sup>
Memo to CEO / File of Most Qualified Design Professional by:	Drafted by Panel Leader, Signed by Chief <sup>4</sup>	N/A	N/A	N/A	N/A
Notification to Ranked Design Professionals	N/A	Drafted by Panel Leader, Approved by Chief <sup>9</sup>	Drafted by Panel Leader, Approved by Chief <sup>9</sup>	N/A	N/A
Notification to Shortlisted Contractors	N/A	N/A	N/A	Drafted by Panel Leader, Approved by Chief <sup>9</sup>	N/A
Board Action DRAFT Prepared by:	N/A	N/A	Panel Leader	N/A	Panel Leader



# The Kick Off *Before* The Kick Off

## Building a Procurement Process

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# The Kick Off *Before* The Kick Off

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## Construction Management and Administration

### Chapter 9

Construction is the execution of work required by the construction and contract documents. It requires heavy coordination, management and oversight. The success of a project depends on how well participants understand their roles and responsibilities, and how well they carry them out. An effective project team works together and communicates in order to increase productivity, reduce project costs, adhere to the schedule and maintain morale.

To support department consistency, a series of pre-construction and construction administration template documents have been developed. Proper use of these documents will ensure consistent, first-class management is provided to all capital projects. The following document titles listed below are all associated with templates which can be found in the Project Templates file folder on the G Drive.

#### 9.1 PRE-CONSTRUCTION

- PDM Task and Responsibility Matrix (Reference Chapter 3)
- Pre-construction meeting agenda
- Pre-construction meeting sign-in sheet
- Project Contract Checklist (Reference Chapter 8)
- Prevailing Wage Contractor Responsibilities document
- Notice of Commencement (Reference Chapter 8)

#### 9.2 CONSTRUCTION ADMINISTRATION:

- Memorandums, Internal and External
- Construction Progress Meeting Minutes
- Submittals
- Daily Construction Reports
- Field orders
- Field reports
- RFI responses
- Proposal requests
- Transmittals
- Pay applications (Reference Chapter 4)
- Punch lists
- Operations transition task tracker

#### 9.3 PROJECT CLOSEOUT

Reviewing closeout procedures at the pre-construction stage is necessary to set expectations well ahead of time. Many closeout documents are prepared during construction, even though submission may not be required until the project is at or near completion. Utilize the



# The Kick Off *Before* The Kick Off

## Building a Process

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# The Kick Off *Before* The Kick Off

Build a ~~Process~~ Culture → Project Kick Off → Project Success



Project Development Manual Task and Responsibility Matrix						Responsibility	
Updated: October 2018						Cleveland Metroparks	Others
PROJECT							
PROJECT No.							
BILLING CODES							
RESERVATION							
Phase	Task Description	Start Date	End Date	By	Notes		
Project Conception, Planning and Pre-Design (PD)							
PD	Project Kick Off Meeting						
PD	Identify project goals and establish project team						
PD	Identify internal stakeholders						
PD	Identify external stakeholders						
PD	Explore plans associated with, and regulations governing, the project site						
PD	Master Plans: ADA and HCRMP						
PD	EPA, ACM, LBP, ESA 1 or 2						
PD	Utilities						
PD	Geotech						
PD	Permits (State, USACE, ODNR, DEPA, Health, Liquor, etc.)						
PD	Title Review						
PD	Operations Impacts						
PD	Special Considerations (FAA, ODOT, Political Considerations, Confined Spaces)						
PD	Other Special Site Constraints or Due Diligence						
PD	Develop preliminary building/site program						
PD	Discuss anticipated project budget						
PD	Prepare project cost estimate and budget worksheet						
PD	Soft Costs (engineering, permits, etc.)						
PD	Construction						
PD	Equipment						
PD	FPE						
PD	IT and AV						
PD	Contingency						
PD	Other						
PD	Project Funding						
PD	Capital Funding						
PD	Grants and Donations						
PD	Other						
PD	Project Schedule						
PD	Real Estate						
PD	Design						
PD	Cost Estimates						
PD	Permit Processing						
PD	Phasing						
PD	Bidding						
PD	Furniture and Equipment Ordering						
PD	Construction						
PD	Data and Security Phase-up						
PD	Move-in						
PD	Marketing & Events						
PD	Staff						
PD	Determine Project Delivery Method						



Inspire. Educate. Unite.

# **Brenden Shea**

## **Vice President of Project Management**

### **Signet Real Estate Group**





# Project Kickoff Event

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**Look to your left and right, you've made it to the starting line...**



*Inspire. Educate. Unite.*



# Framework

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## Purpose

- Mission setting
- Owner = Project CEO

## Project CEO Responsibility

- Vision
- Proper resource allocation of people and capital
- Build a positive culture
- Make good decisions
- Oversee and deliver on performance expectations





# Vision

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*Inspire. Educate. Unite.*



# Build a Positive Project Culture

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**Marathon, not a sprint**

**No better time than now**

**Refueling**

**Don't cram**

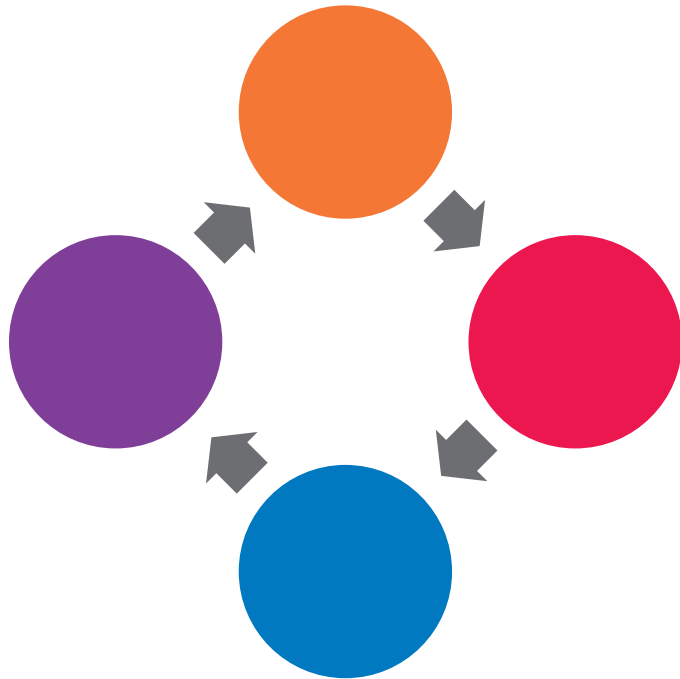




# Build a Positive Project Culture

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## Feedback Loop



## Project Team Norms

- Decision making
- Communication
- Behavioral / day to day
- Conflict resolution



# Team Norms example

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- Bring proposed solutions not just problems.
- Decision Making
  - No revisiting made decisions unless new and relevant information surfaces and communicate the impact of those decisions.
  - Resolve conflict and make decisions at the appropriate level closest to the problem.
  - Have a decision making plan and impact analysis for the project for the various tiers of approval . Have the ultimate decision maker brought into the decision.
- Transparency and Accountability. Avoid finger pointing, if you make a mistake, own it, work with team to solve the problem vs. punishing.
- Be clear about expectations. Check for understanding.
- Create an effective team communication plan.
  - Follow-up to non-written communication/decisions with documentation.
  - Use concise bullet points to summarize meetings and discussions for documentation purposes.





## Team Values example

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- Enjoy the journey but *remain* focused on the destination. Have fun but remember we have a job to do.
- Bring forth the culture of caring and engagement.
- Enhance collective safety culture. Start meetings with a *safety tip* to think about things that might prevent an injury.
- Assume goodwill between team members, use positive humor, leave your ego at the door, and use constructive honesty.
- Team respect.



# Collaborative Mindset

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- Owner invested in the process
- Every team member believes in the process
- Environment is open to new ideas
- Check “can’t dos” at the door (yes, if we...)
- Check “egos” at the door
- Develop team communication process



# Be Innovative

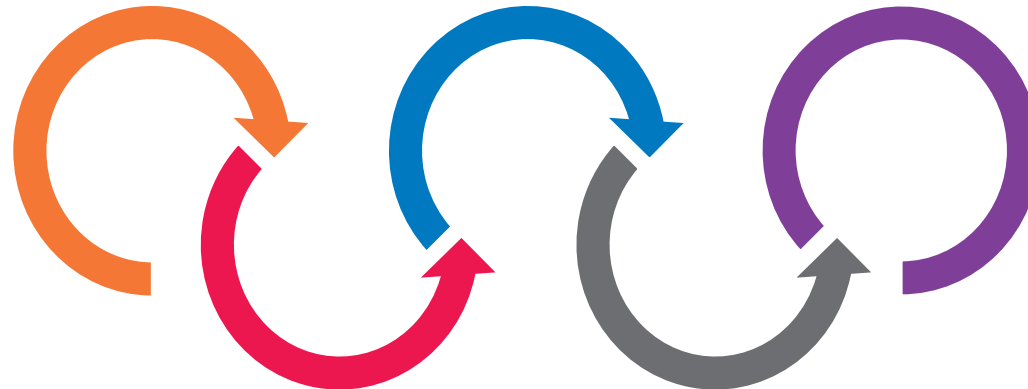
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## Lessons Learned

- Continuous improvement

## New Innovations

- Better than the last project



# Inertia



It's incredible what can happen when you stop driving with the emergency brake on

- Tim Ferriss

*Inspire. Educate. Unite.*



# Breakout Sessions

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- **What would be most beneficial to get out of a kick-off?**
- **What are some important questions that seem to get left out of kick-off discussions?**
- **Should the kick-off be led by a third-party facilitator?**
- **When should a kick-off occur?**
- **What expectations do you set to prepare for a kick-off?**



## Group 1 - Reporter : Doug Myers

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- **What expectations do you set to prepare for a kick-off?**

Who? Organizations and roles

When?

Methods of delivery for project

What type of culture?

Engagement

Lines of communication

How many of these meetings?

What information can we share?

Expectations from each team member

Maintenance of take-aways



## Group 2 Reporter: Shariq Ali

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- **What would be most beneficial to get out of a kick-off?**
  - Learn Potential Challenges and try to plan and avoid being blind sided
  - Get together and talk about things to get solutions
  - Meet all the team members including subcontractors and create collaborative environments.
  - Establish expectations of the Owner and team members - Feel part of the Team
  - Establish set points to follow through with collaboration
  - Bring up lessons learned of Owner or design team to learn about facilities and potential issues
  - Establish a protocol to address issues when they arise in order to keep a collaborative team.
  - Sharing the real meat of the budget - Honest conversations upfront on the budget
  - A true Team integration - no Us vs Them
  - Level of understanding of what looking and Owner limitations
  - Definition of Success



## Group 3 – Reporter: Aaron Lobas

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- **What are some important questions that seem to get left out of kick-off discussions?**
  - What does success look like
  - What are the biggest risks (to all parties) and to the project
  - Who is not represented at the meeting
    - What critical parties need to be brought in early
  - What is the process of decision making
  - Determine communication channels and protocols





## Group 4 – Reporter: Arne Goldman

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**Should the kick-off be led by a third-party facilitator?**

- **Design Kick-off vs. Construction Kick-off**
  - Kick-off needs to be defined. Teaming vs. instructions to team.
- **3rd party service facilitates kick-off and then can be “on-call” if needed afterward. Where used, facilitator was a separate billable service.**
- **In a lot of our project experience, design and construction kick-off are at same time.**
- **This group had many different experiences regarding kick-offs...every project dictates different approaches.**



# Group 5 - Reporter: Jeff Cerveney

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## When should a kick-off occur?

- Multiple kick-offs (what type of deliverable)
- Kick off depending on the phase of the project. Early on with Users
- Key component of the team is on-boarded
- Kick-off to develop onboarding process for new team members including videos
- As an owner understand key player relationships in a kick-off meeting.
- Video kick-off meeting for later use as a way to not lose energy

# Report out the Breakout Session Results



# Take-aways

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- 1: Be as inclusive as possible
- 2: Have clear goals & objectives
- 3: Consider what might go unspoken or assumed
- 4: Focus on developing your process & culture first
- 5: Establish team norms





# Take-aways

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- 6: Establish lines of communication
- 7: Map out the work (flowchart or other tool)
- 8: Be honest about scope, budget, and driving goals
- 9: Identify the right time for the kick-off
- 10: Set expectations before the kick-off



# Plus / Delta

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## Plus (+)

**Good job Bonnie!**  
**Good time management**  
**Good blend of partners and EL**  
**Discussion leaders**  
**Fish joke**  
**Guests were thankful for  
being part of event**

## Delta (-)

**More time needed in breakout  
rooms**  
**Miss the networking/catch-up  
opportunities of in-person**

# Next Program

26 May 2021

GMP / Design Sign-Off

*Bring a Guest*