

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 <u>www.cogence.org</u>



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How Can You Help COGENCE?

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(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
- **O** Program Introduction & Survey Results
- Presentation 1: Sean McDermott
- Presentation 2: Brenden Shea
- Breakout
- Sreakout Results, Summary, and Takeaway
- +/Delta



Project Kick-Off

24 March 2021

Q1

Q

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



Q2

9

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



Answered: 26 Skipped: 0

COGENCEAlliance

Owners+Architects+Engineers+Contractors

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.



Inspire. Educate. Unite.

Q3

 \mathbf{Q}

Q5

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

Q

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

Q

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

Answered: 26 Skipped: 0



Q7

Q

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

9

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

Q

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





- 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







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Planning & Design PROJECT DEVELOPMENT MANUAL

Updated: December 2018

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4.3 PURCHASE

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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:
 Widely known method 	 Reliance that engineer's estimate is accurate to project
 Well established roles and responsibilities 	and market conditions
 Effective in determining least cost 	 Potential and unpredictable change orders
	 Over budget bid risks time delays and added design fees
	 Limited subcontractor quality control

5.2 DESIGN-BUILD

Construction quality control

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 me goals and objectives. The second step involves proposals which includ 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.

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:
 Qualification based selection 	 Additional time required on front
 Compression of project schedule 	end
 Budget and cost control 	 Bidding competition more limited
 Construction quality control 	

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.

1	procedures.		Benefits:	Limitations:				
Benefits: Limitations:		 Budget and cost control 	 Additional owner management 					
L	 Qualification based selection 	Additional time required on front		required				
L	 Compression of project schedule 	end						
L	 Budget and cost control 	 Bidding competition more limited 						
I.	 Design control 							

Inspire

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10. Community	

Construction Management and Administration

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

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
- Submittab Daily Construction Reports
- Field orders
- Field reports
- RFI responses
- Proposal requests
- Pay applications (Reference Chapter 4)
- Operations transition task tracker

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 www.mence.are.prepared owing conservation, even encough sources and maximum may may not be required until the project is at or near completion. Utilize the

Cleveland Metroparks: Planning & Design - Project Development Manual

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Chapter 9

Building a Process

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Brenden Shea Vice President of Project Management Signet Real Estate Group



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



Framework

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


0

Build a Positive Project Culture

Marathon, not a sprint

No better time than now Refueling Don't cram



Build a Positive Project Culture

Feedback Loop



Project Team Norms

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

Team Norms example

- Bring proposed <u>solutions</u> not just problems.
- Decision Making
 - <u>No revisiting made decisions</u> unless new and relevant information surfaces and communicate the impact of those decisions.
 - Resolve <u>conflict and make decisions</u> at the appropriate level closest to the problem.
 - Have a <u>decision making plan and impact analysis</u> for the project for the various tiers of approval . Have the ultimate decision maker brought into the decision.
- <u>Transparency and Accountability</u>. 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 <u>concise bullet points</u> to summarize meetings and discussions for documentation purposes.

Team Values example

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

Collaborative Mindset



- 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



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

Breakout Sessions

- 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

 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

- 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

- 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

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 "oncall" 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 kickoffs...every project dictates different approaches.

Group 5 - Reporter: Jeff Cerveny

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

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



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 (+)

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