



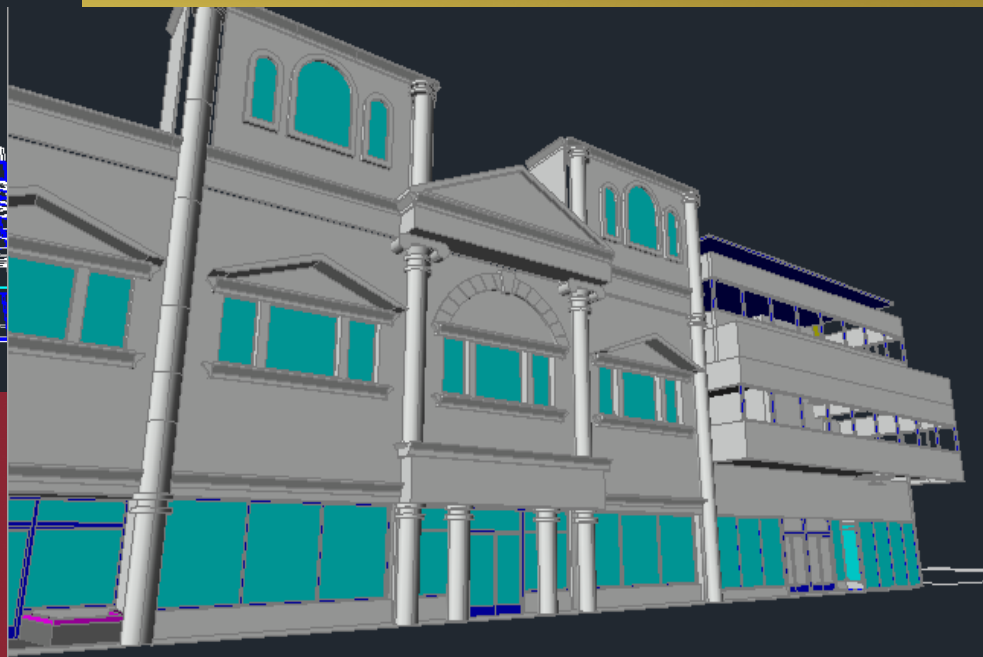
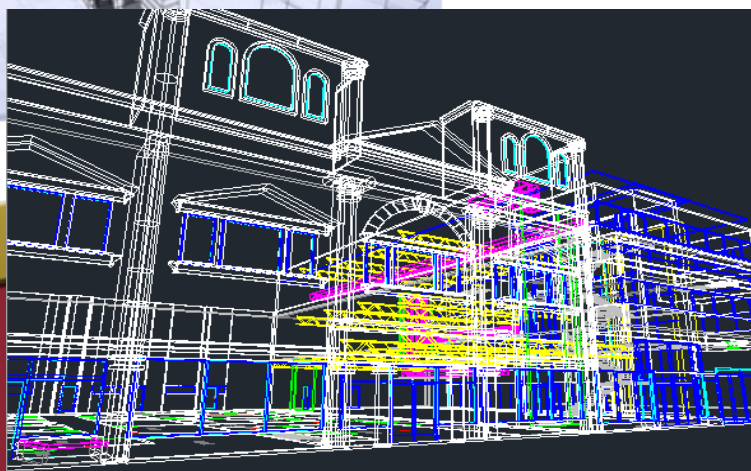
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Capital Planning & Construction

What is Construction Project Management?



Coordinating one aspect of a construction is a difficult task. But coordinating the entire process, from initial planning and foundation work, through the final coat of paint in the last room, takes someone with the managerial skills of Lee Iacocca, the force of will of General Patton, and the patience of Job. Being a construction manager demands organization, attention to detail, an ability to see the “big picture,” and an understanding of all facets of the construction process, usually acquired through experience. “It’s exciting” and “It’s hard” <https://www.princetonreview.com/careers/44/construction-manager>



Combining years of skill and experience with powerful industry-proven tools, Capital Planning & Construction (CPC) transform design concepts into operational reality.

The following slides are merely a glimpse of this road traveled!

Conceptual Art, AAC Façade remodel & 3-story BBC



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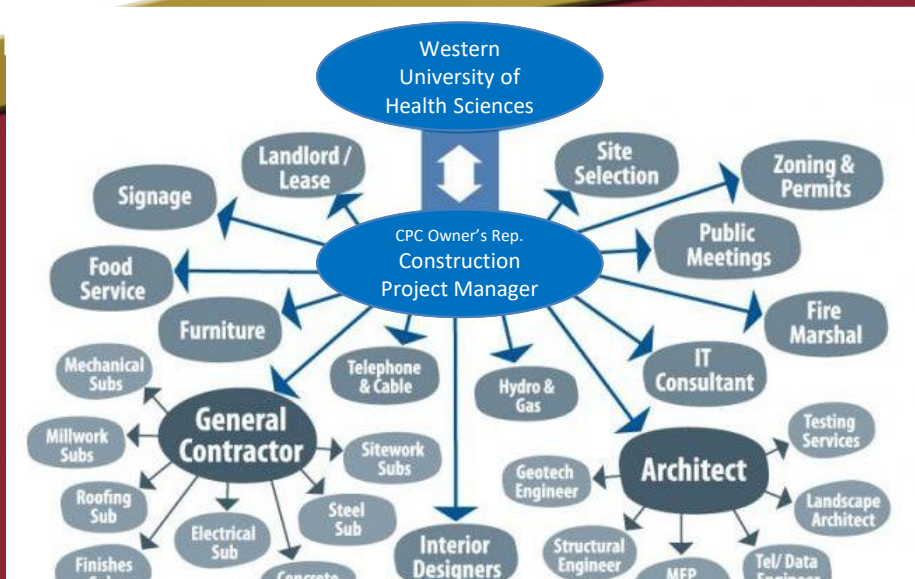
Project Management Responsibilities



Core Objectives

What are the responsibilities of a Project Manager?

1. Planning
2. Hire, fire and supervise
3. Set goals
4. Deliver on time
5. Stay on budget
6. Keep client and your boss informed
7. The dispute manager
8. Draft & enforce contracts
9. Manage risks



Construction Workforce

The construction project manager is the key figure of the construction team. Without the project manager, the team will fail hard. Imagine what would happen if the project manager does not know Who, When, Where, Why & How to best deploy the large work-force to achieve the aforementioned responsibilities?



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1. Planning & Goal Setting (Management Stages)



CP #HPC-0521-01 - Update Project Status

Update the dashboard for the capital project *CP #HPC-0521-01 - Bookstore Move/Relocation* on . Select the active project phase and indicate the current status of the project. Status codes are grouped according to project phase. Click the Update button or click Cancel to return to the main project page.

Programming <ul style="list-style-type: none">ON-HOLDMaster PlanningScope DefinitionExhibits & SchematicsPreliminary CostingBasis of DesignBudget Planning/RequestsBudget Approvals	Procurement <ul style="list-style-type: none">RFQ/RFP DistributionRFQ/RFP EvaluationsNOI to proceedLegal ReviewDocument ConsignmentContract Documents ProcessingPO ProcessingChange Order	Design <ul style="list-style-type: none">Preliminary DesignSchematic DesignDesign DevelopmentConstruction Documents	Entitlement/Contracts <ul style="list-style-type: none">Agency Submittal PkgsPlan CheckEquipment/Materials ProcurementBid to General ContractorsBid EvaluationsNotice of Intent - G.C.Legal Review - G.C.Doc Consignment - GCContract Documents Processing - GCPO Processing - GCConstruction Queue/Staging Planning	Construction <ul style="list-style-type: none">Construction Kick-OffStaging & Site PrepConstruction/Installation - Facilities TeamConstruction/Installation - GC/VendorInstallation - AV/ITSubstantial CompletionConstruction Punch List	Commissioning <ul style="list-style-type: none">Warranty Turn-OverEquipment TrainingAs-Built Record Set	Close-Out <ul style="list-style-type: none">Stake Holder Walk-Thru	Completed <ul style="list-style-type: none">Completed-Pending Triggered Corrective TaskCompleted-Pending Admin Close-outClosed - Completed Project, Deliverables & Financials
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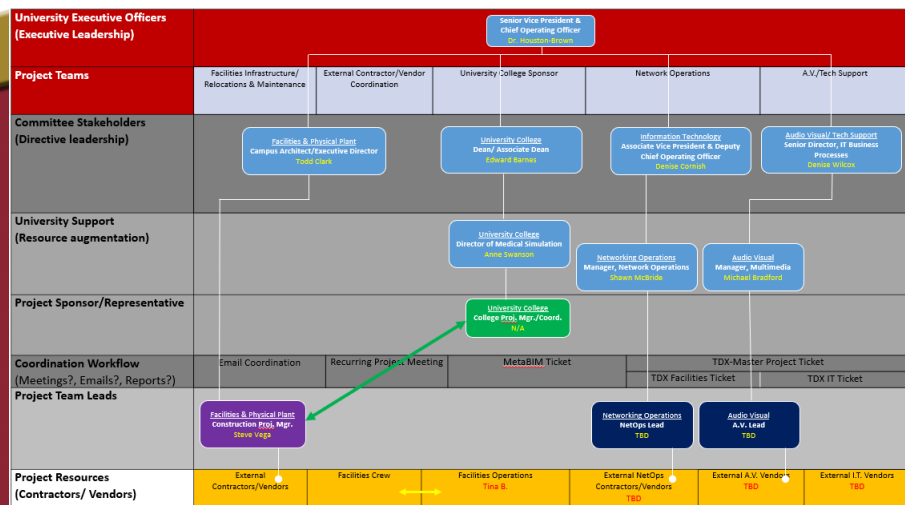
Construction Phase Management



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Capital Projects - Construction Workflow

(Excludes Maintenance Only Projects)



Project Internal/External Coordination Flow

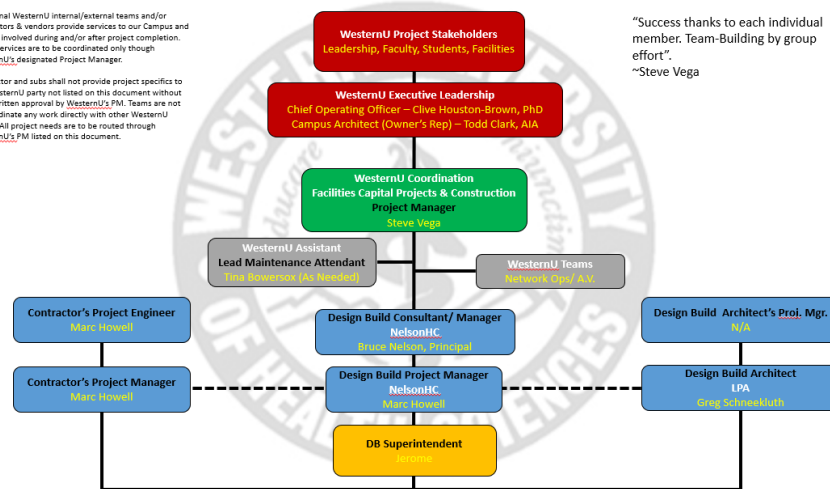
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DESIGN BUILD (DB) - PROJECT TEAM

Additional WesternU internal/external teams and/or contractors & vendors provide services to our Campus and may be involved during and/or after project completion. These services are to be coordinated only through WesternU's designated Project Manager.

Contractor and subs shall not provide project specific to any WesternU party not listed on this document without prior written approval by WesternU's PM. Teams are not to coordinate any work directly with other WesternU teams. All project needs are to be routed through WesternU's PM listed on this document.

"Success thanks to each individual member. Team-Building by group effort".
~Steve Vega



Construction Coordination Flow



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2. Hiring most Qualified & Supervision

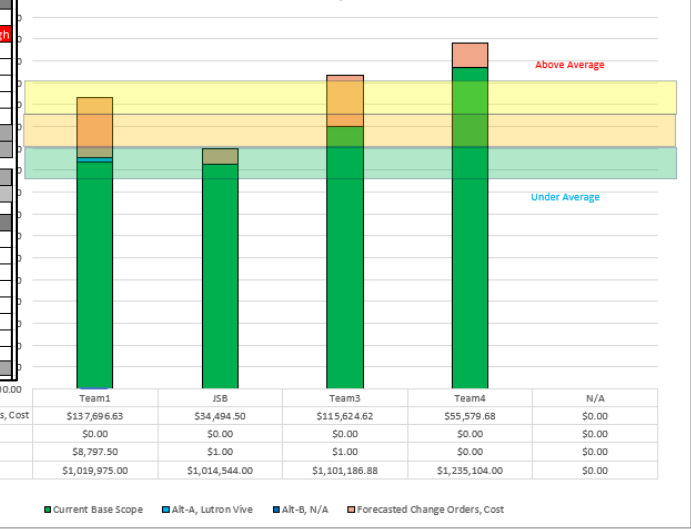
1. Bid Price Category/ Ranking

2. COR Risk Status

3. Financial Assessment

Bid Scoring Matrix HSC East-West Classrooms					
	Team1	Team2	Team3	Team4	N/A
	Second Place	First Place	Third Place	Fourth Place	
	114	134	107	99	
Base Scope GMP Target	\$1,092,702.47				
Acceptable Low/ High Deviation Window	\$983,432.22 - \$1,201,972.72				
Stage-1, Base Proposal Cost	\$1,019,975.00	\$1,014,544.00	\$1,101,186.88	\$1,235,104.00	\$0.00
Bid Price Category/ Ranking	Within Deviation Risk Low High COR Risk	Within Deviation Risk Low Low COR Risk	Within Deviation Prime High High COR Risk	Above Deviation Disqualified High Low COR Risk	Disqualified High
COR Risk Status	High COR Risk	Low COR Risk	High COR Risk	Low COR Risk	
% Deviation from GMP Target	-6.7%	-7.2%	0.8%	13.0%	
Forecasted Change Order Escalation	\$137,697	\$34,494	\$115,625	\$55,580	
% COR Risk	13.5%	3.4%	10.5%	4.5%	
Alternate-A, Lutron Vive	\$8,797.50	\$1.00	\$1.00	\$0.00	\$0.00
Alternate-B, N/A	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Priced Total (Base & Alternates)	\$1,028,772.50	\$1,014,545.00	\$1,101,187.88	\$1,235,104.00	\$0.00
Forecasted Budget Need	\$1,186,015.80	\$1,068,315.85	\$1,237,735.07	\$1,314,150.66	\$0.00
Financial Assessment					
Deviation Category Rank	4	4	4	0	
Deviation Placement Rank	4	4	3	0	
COR Risk Rank	0	4	0	4	
Financial Assessment Point Total	8	12	7	4	
Number Ranking (of 12 total)	4	0	5	8	
Percent Financial Risk	33%	0%	42%	67%	
Financial Assessment Ranking	2	1	3	4	
Financial Assessment Placement	B Rating	A Rating	C Rating	D Rating	

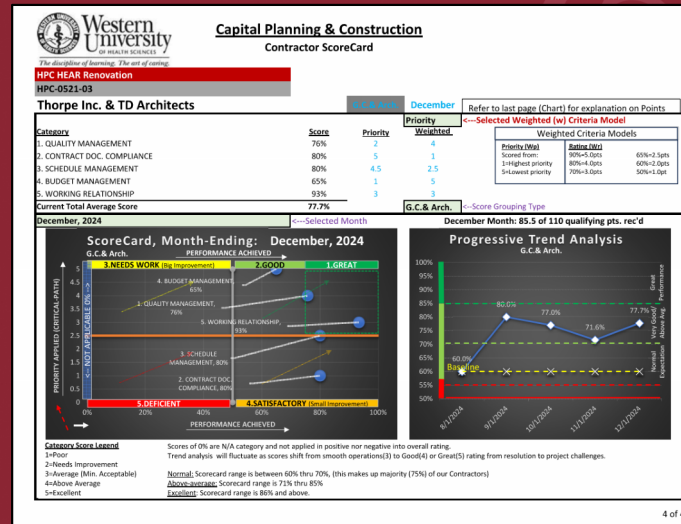
Final Base & Alternates & Projected COR



Qualifying Best-Project Value

Bid Scoring

Forecasting Lowest Financial Risk



Progress Supervision (Contractor Scorecard)



3. Setting Long & Short-Term Goals

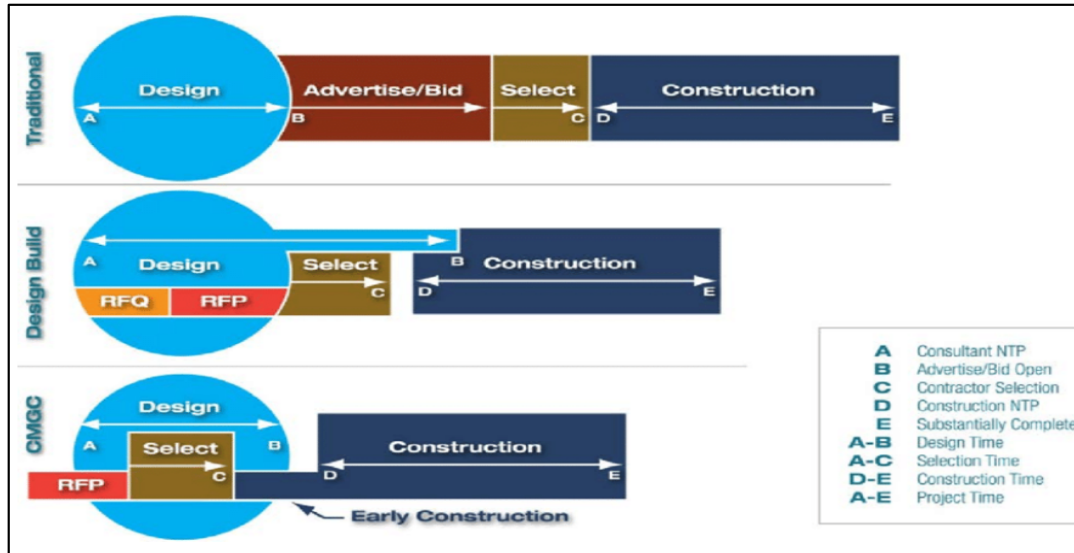


Meeting Minutes & Deliverables

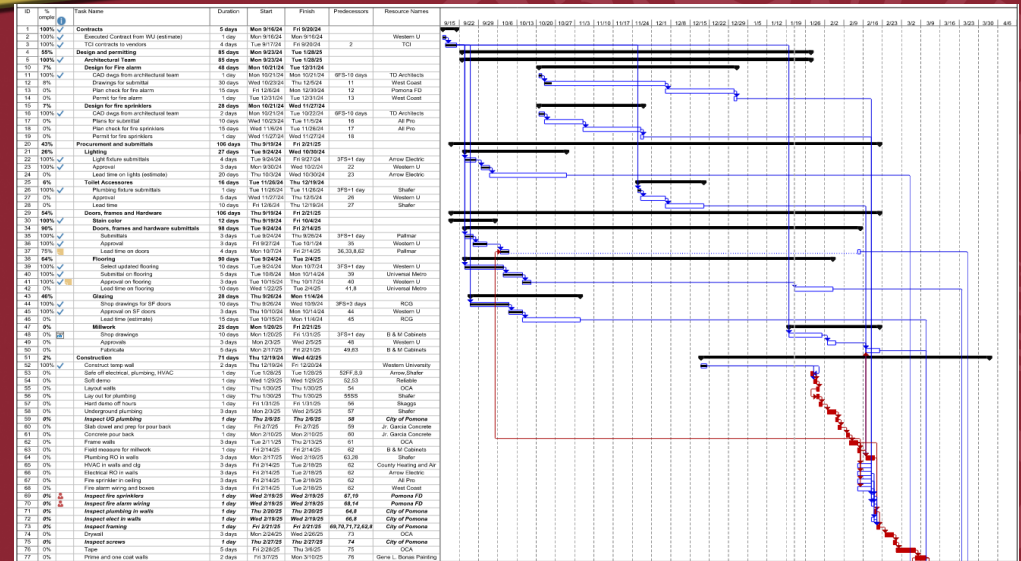


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4. Deliver on Time



Project-Delivery Method Selection



General Contractor Construction Schedule



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5. Stay On Budget

Funding & Allocations

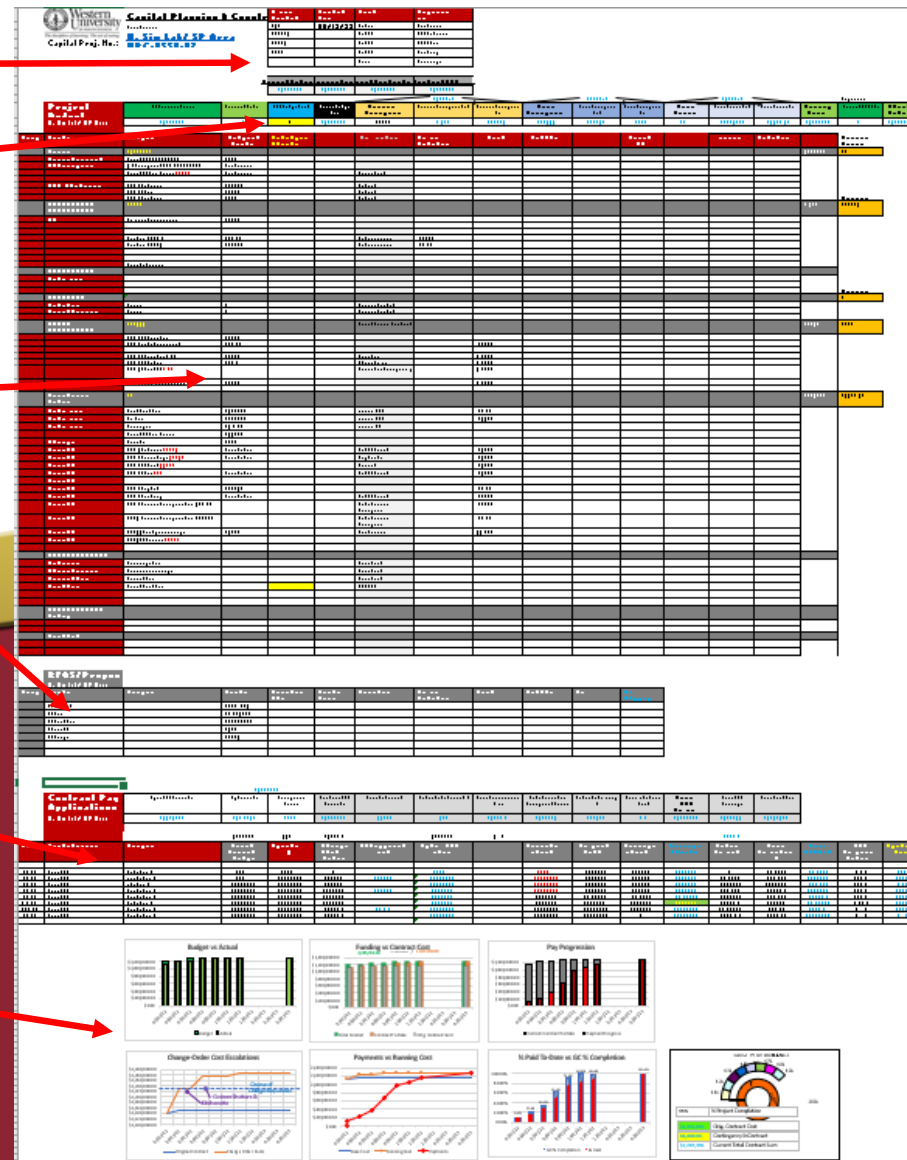
Financials Summary Header

Budget Control & Management

RFP/Proposals/Estimates Log

Contract Payouts & Budget Auditing

Chart Tracking of expenditures



Capital Construction Budget Tracking



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6. Keep Client & Boss Informed

POMONA CAMPUS STANDARDS & DIVISION 00 & 01 SPECS

A. New Campus Standards

1. Promotes lowered cost and improved aesthetics
2. Improves serviceability time & cost due to standardization
3. Improved space logistic operations reducing storage issues.
4. Reduced Operation/maintenance time with reduced variety sourcing
5. Expedited maintenance time replacement
6. Improved branding image with better aesthetic unification.
7. Improved time/workflow coordination with external consultants
8. Reduced errors in cost for incorrect installs & products.
9. Reduced risk of change order costs & project time delays.

B. New DIV. 00 & 01 Specifications

1. Reduces time on procedural guesswork by establishing requirements.
2. Reduced change orders cost for uncertainty
3. Improved apples-to-apples bidding
4. Improves time on billing
5. Reduces cost associated

Campus Construction Standards

PROJECTS AGENDA/SUMMARY REPORT

Projects Summary

1. New Projects Agenda/Summary Report

1. Improves efficiency management of various construction and operational needs.
2. Introduces extrapolation of data to incorporate non-sensitive information for project health status
3. Provides time & cost statistical information.

UNIVERSITY CONSTRUCTION KICK-OFF PACKAGES

1. New Construction Kick-Off Packages

1. Improves coordination & policies with vendors/contractors
2. Improves time & efficiency of project team with consistently available information
3. Improves communication workflow by identifying respective leads
4. Improves project flow procedures & identifying emergency services

The package includes:

- Project Charter
- Project Scope
- Project Schedule
- Project Budget
- Project Risk
- Project Communication Plan
- Project Stakeholder Map
- Project Quality Management Plan
- Project Safety Management Plan
- Project Environmental Management Plan
- Project Social & Environmental Management Plan
- Project Governance
- Project Reporting
- Project Evaluation
- Project Closure

Kick-Off Packages

FIELD OBSERVATION REPORTS

1. New Field Observation Reports

1. Improved communication & transparency by immersing stakeholders into project via report updates, diagrams & photos.
2. Reinforces the established end-user management committee.
3. Improves tracking and time sensitive needs of key deliverables.
4. Improves customer/stakeholder satisfaction with photographic journal of work progress.
5. Improves coordination with the end-users to identify potential College or University event conflicts

Field Obs. Reports

CAPITAL CONSTRUCTION METRICS MONITORING

Metrics Monitoring

Budget vs Actual

Funding vs Contract Cost

Pay Progression

Escalations

Payments vs Running Cost

Completion

Metrics Monitoring



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7. Dispute (Negotiation) Management

Client

Getting charged
by the General Contractor

General Contractor

Sub-Contractors

Charging the
General Contractor



Facilities Proj. No.:

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Project Financials

[HSC-OMM-COMP TI Expansion](#)

[HSC-0550-04](#)

4.97%	3.50%
<u>Negotiated Cost Savings to Date</u>	<u>Scope Increase/Adds</u>
\$70,037.75	\$58,855.39

Project Budget

A/E Construction Contract

Construction Budget

HSC OMM-COMP Skills Lab				
Status: Completed				
Date	Description	Original Amount	Negotiated Amount	Savings
	CO E01	1,687.58	0	1,687.58
	CO E02	6,003.90	0	6,003.90
	CO E03	3,142.31	0	3,142.31
	CO E04	2,114.85	0	2,114.85
7/21/22	CO E05	36,094.23	27,680.23	8,413.77
7/21/22	CO E06	2,027.60		
7/21/22	CO E07	17,081.55	12,699.94	4,381.61
7/21/22	CO E08	4,299.69		
7/8/22	CO E09	1,939.25	1,702.21	237.04
7/8/22	CO E10	1,994.73	1,754.97	239.76
7/8/22	CO E11	6,431.25		
7/22/22	CO E12	8,460.90	7,774.35	686.55
7/21/22	CO E13	1,399.93		
7/21/22	CO E14	4,272.20		
				+more
	8/23/22 email totals			
Totals		127,690.00 TTL	57,653.25 Rev	\$70,037.75 Final



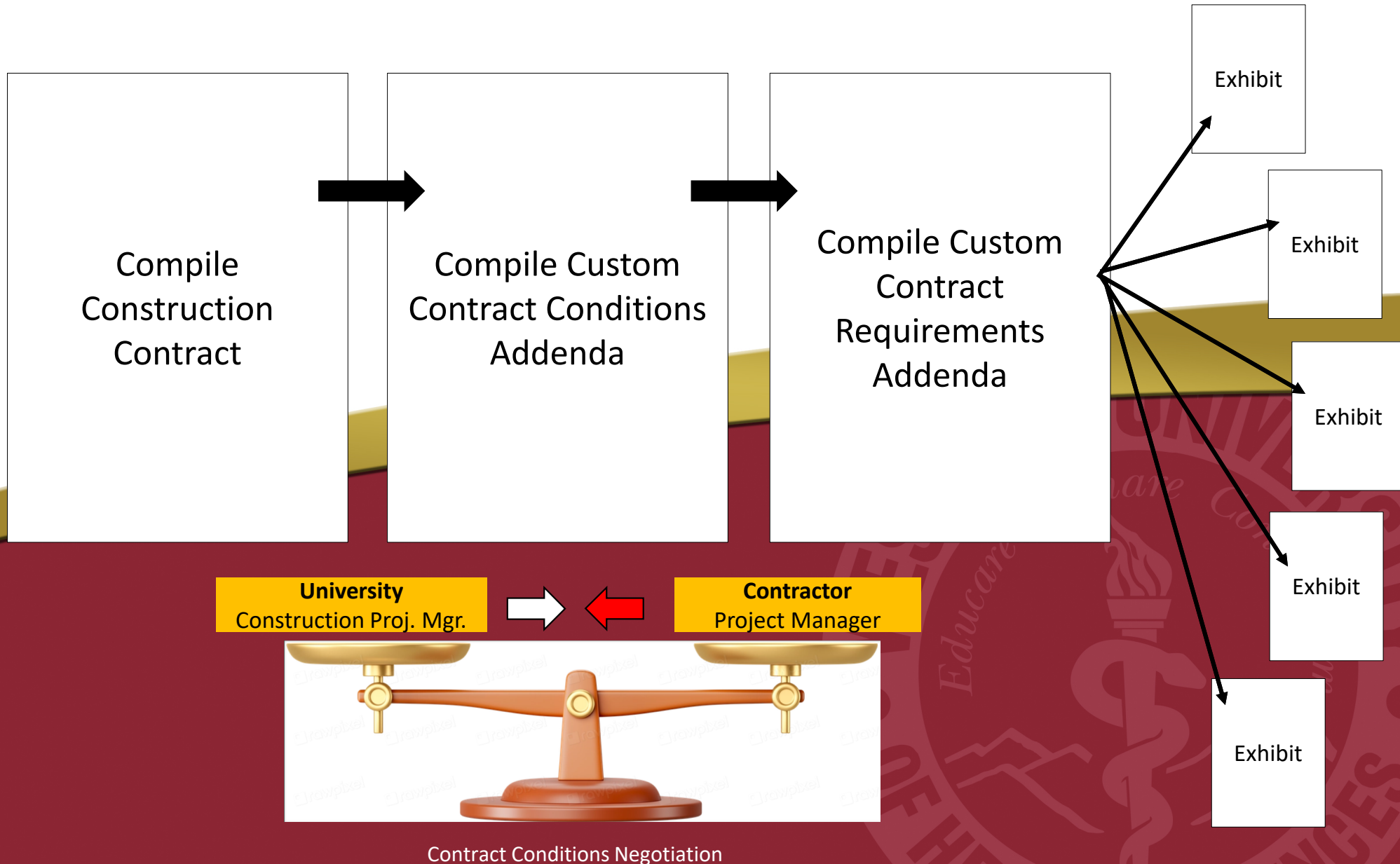
Contract Negotiations & Jobsite Performance Disputes



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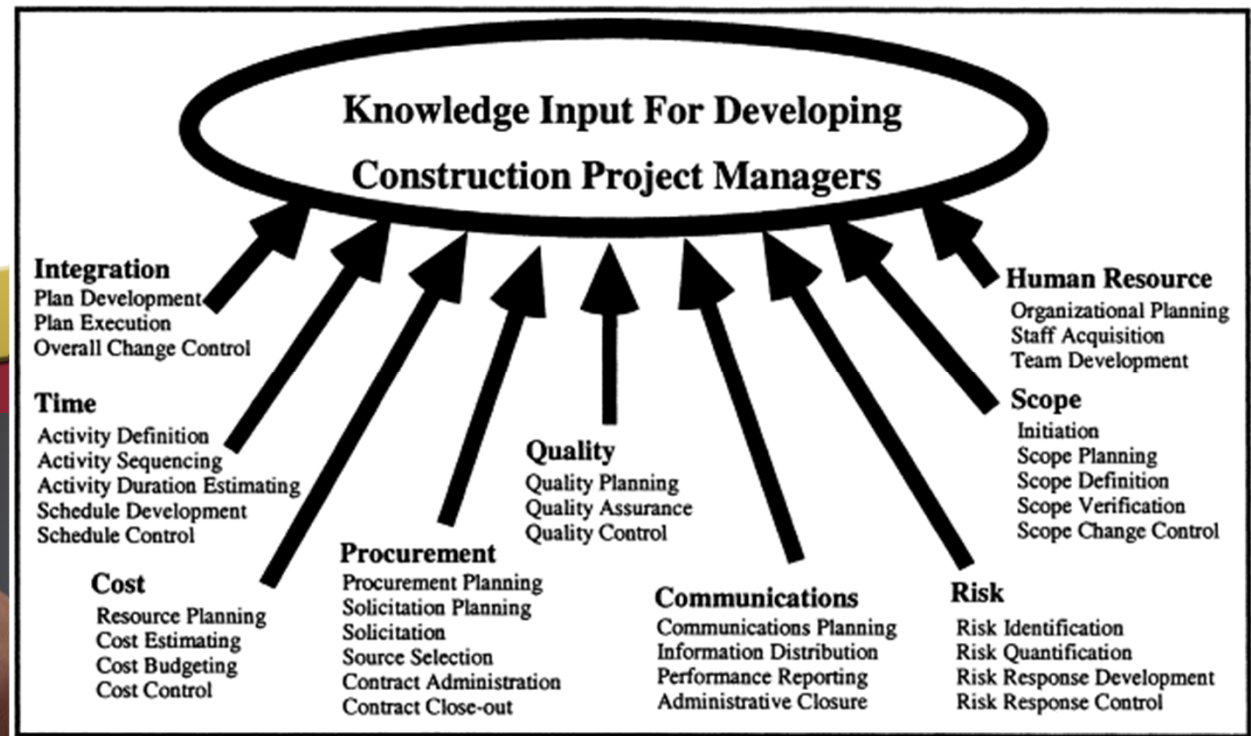
8. Draft & Enforce Contracts





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9. Manage Risks





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For more detailed information on any of the above tools & methods, Visit the Major Capital Construction Tools & Methods” Section for an In-Depth presentation.

The End

