

## Owner's Representative and Construction Management Services

Oregon City Operations Complex Development

April 18, 2019



City of Oregon City  
Attn: John M. Lewis, Public Works Department  
625 Center Street  
Oregon City, OR 97045

April 18, 2019

RE: Owner's Representative Services Statement of Qualifications

Dear Mr. Lewis, Ms. Harris, and Members of the Selection Committee:

You have an important role as stewards overseeing the planning and building of the new Oregon City Operations Complex. Bringing a new public services facility to fruition requires a great deal of upfront and thoughtful planning. PlanB Consultancy (PlanB) is excited to partner once again with the City of Oregon City to successfully deliver this much needed project. PlanB is Portland's leading expert in Project Management and comprehensive Owner's Representative services. We ensure that all stakeholder needs are met and that design and construction occur through a transparent, educated, and efficient process.

In addition to our experience as Owner's Representatives on local mega projects, education campuses and government buildings, our team members have worked on/are currently working on multiple public building projects. These include the **new Oregon City Police and Municipal Courts Building, the City of Tualatin Service Center, the University of Portland's new River Campus, and the Washington County Jail.**

A successful public project requires an experienced and knowledgeable team on your side to make sure that **all areas of the building process are done in a highly productive, transparent, and cost-effective way.** PlanB has provided similar services for public and private entities nationally and internationally for over thirteen years. Our process is focused on providing effective, implementable solutions, tailored to your unique needs. With PlanB, there are no "standard" or off-the-shelf solutions. From cities to industries, we provide savings and consistency with all aspects of construction monitoring and project management. Our experienced project team has the following attributes:

- Project Management Professionals (PMP) who have provided Owner's Representative Services for construction projects, as well as registered Professional Engineers (PE's) who understand the nuances of the design and construction cycles.
- Experts in Facility Maintenance and Operations management, with extensive knowledge of international best practices and built environment asset management through the whole building life cycle.
- A close working relationship with the Energy Trust of Oregon as an Allied Technical Assistance Contractor (ATAC), giving us an insider's perspective on environmental sustainability issues and money-saving incentives.
- Cross-discipline Quantity Surveyors (cost engineers) with an unmatched estimating track record for the local market across all contracting methods, clients and project types and a documented estimating accuracy within 3% on projects up to \$1.5B. We leverage their expertise to negotiate costs on our clients' behalf.
- An extensive history working with government agencies to review existing agreements and use our knowledge of cost and scheduling to save money and support the City of Oregon City in pre-design, design, and construction phases.
- Strong, clear oversight and implementable recommendations based on the City's specific needs and best practices.
- Leaders in identifying and applying advanced contingency guidelines through active risk management. This allows our team to quantitatively define and manage what the project contingency costs could be and communicate them clearly to the public.

**We are looking forward to continuing our support of the City of Oregon City** by partnering with your team to deliver this exciting project. We encourage you to call our client contacts listed in our references, as they are the most qualified to speak to the value we bring.

Sincerely,



Euan Pollock  
Managing Partner  
503-850-9876  
epollock@planbconsult.net





## A. Basic Information



PlanB Consultancy, Inc. (PlanB) has provided Owner's Representative and Project Management consulting advice to governmental and private clients since 2006. We take our role as the Owner's Representative very seriously, using our expertise to look out for your best interests as well as provide concrete ways to save time and money. PlanB provides the full range of Owner's Representative services and Project Controls, from feasibility advice during the early concept stages to settling the final payments and negotiating any claims at project completion. **We pride ourselves on the ability to narrow down complex problems** to better focus on each of the many parts of Owner's Representation and Project Management. We also bring best practice solutions from the private sector and from our work internationally.

To be successful, our team works hand-in-hand as partners with project stakeholders. PlanB brings the right expertise to the table and empower both our colleagues and clients by cultivating high performing project teams. We embrace innovation and clear communication. Our experience from a variety of industries has provided our team with a well-rounded perspective.

PlanB is currently providing estimating, risk management, project cost control, project scheduling, and contract claims analysis and negotiation services to several Fortune 500 companies locally, nationally, and internationally. We have successfully helped our clients keep their projects within budget and on schedule. **We find the best value, with the highest standards of quality.**

The individual authorized to represent PlanB in all correspondence and negotiations related to this contract is Euan Pollock, Managing Partner. PlanB's Project Manager will be Gerard Mulrooney. Contact details for each are provided below.

Authorized Individual	Project Manager
<b>Euan Pollock</b> <i>Managing Partner</i> epollock@planbconsult.net 696 McVey Ave, Suite 202 Lake Oswego, OR 97034 Fax: 503-907-5229 Phone: 503-850-9876	<b>Gerard Mulrooney</b> <i>Lead Consultant</i> gmulrooney@planbconsult.net 696 McVey Ave, Suite 202 Lake Oswego, OR 97034 Fax: 503-907-5229 Phone: 971-337-3678

### STAFFING COMMITMENTS

The PlanB office is in Lake Oswego, a close neighbor to Oregon City, giving us the proximity necessary to have a strong on-site presence at the project location. In addition, we are currently working as the Owner's Representative for the City of Oregon City's Police and Municipal Courts building, giving us a solid understanding of how Oregon City works, its mission and vision, key stakeholders and operational standards. The team assembled for this Project includes a blend of experienced and capable staff familiar with Oregon City and experts in Project Management and Owner's Representation. **Gerard Mulrooney** will be the Project Manager, with **Jordan Henderson** acting as Deputy Project Manager. **Ernesto Vasquez** will provide Project Management support, **Dan Tedrow** will serve as the commissioning expert and **Scott Vernon** will be the senior scheduler for the project. Staff named on this project are committed to the project, and PlanB is dedicated to our employees and employee retention.

### DBE/MBE/WBE/SDB PARTICIPATION

PlanB started as an Emerging Small Business (ESB) but graduated out of the program. However, we are dedicated to working with DBE/MBE/WBE/SDB Businesses whenever possible, as sub-consultants and partners. We actively seek out these businesses through participation with Oregon Association of Minority Businesses (OAME), as well as events such as the Governor's Marketplace in Salem, Oregon.

## B. Capabilities and Approach

Our success stems from our ability to work collaboratively with our clients. PlanB's ongoing work with the City of Oregon City for the new Police and Municipal Courts Building provides us with a strong understanding of the City's unique needs and key stakeholders. To manage this project on behalf of the Public Works Department, we would build on these existing relationships and continue to develop an in-depth understanding of the Department's needs relating to this particular project. We understand there are several divisions that will be moving into this building and will need to ensure their specific needs are addressed. Our collaboration with each group will allow us to act as **an extension of City staff** throughout the project, managing the pre-design, design, and construction phases of the project with the City's interests in mind.

PlanB's value as an Owner's Representative includes:

1. An experienced and local team. Based in Lake Oswego, we are a stone's throw from the project site. **This allows our team to be highly responsive to the City's needs** and to perform site visits on a moment's notice.
2. The ability to actively manage cost to deliver fiscally responsible projects for owners who have value conscious stakeholders. **We recently saved the Oregon City Police Department \$200k** during the Architect and Engineering (A&E) negotiations stage.
3. A proposed project team that integrates traditional Owner's Representative services with value added services, to incorporate an integrated team of industry professionals that can deliver the project for **the best possible value to Oregon City**.
4. A proposed team consisting of Project Management Professionals, Members of the Royal Institution of Chartered Surveyors specializing in value management, registered Professional Engineers, energy specialists, commissioning specialists, and scheduling professionals.
5. **Integrated design, cost, and schedule management.** These are key to any project. We actively manage the design process working hand in hand with the A&E team to ensure cost effective solutions are incorporated and are constructible and maintainable.
6. Experience owning, operating, delivering, and designing Public Works Complexes. Our team includes professionals **who previously worked for a public works department and were involved with the continual operations and improvement of the facilities complex.** This provides our team with a contextual understanding of project requirements and implementation strategies.
7. Integrated constructability review and sustainability oversight.

---

### ***1. Demonstrated knowledge of providing Owner's Representative services/Construction Management and the capability to furnish personnel to accomplish the work in a timely manner.***

---

PlanB has provided Project Management and Owner's Representative services since our inception in 2006. Our multi-discipline project team includes experts in Project Management, Engineering, Construction, Public Outreach, Building Operations, Commissioning, and Cost and Schedule Management. These experts have all worked extensively with public agencies, including Oregon City, and bring best practices from public and private sector mega-projects, positioning PlanB to provide the maximum value and service to the City. To support the City in delivering this project, PlanB will work in a collaborative fashion to ensure successful execution of the project. We will:

- Represent the City in all aspects of project delivery for the Operations Complex in order to meet or exceed the objectives for the project.
- Work **collaboratively and transparently** with the City project team and stakeholders.
- Actively manage cost and oversee design throughout the project to ensure Oregon City is obtaining the best value facility with the lowest facility life cycle cost to ensure long term savings.
- Perform as a trusted advisor during project delivery method selection and Architect and Contractor acquisition. This includes conducting contract negotiations on the Owner's behalf and representing Oregon City throughout **all facets of the project's life.**
- Liaison with all project members to coordinate communications and documentation while keeping the owner informed of progress, issues, and solutions per the communications plan.
- Provide project oversight and track construction status throughout the project via regular project schedule and status updates and regular site visits.
- Ensure that **all potential project-related issues are addressed**, and drive for timely solutions to challenges and clear communications to ensure each member of the project team is aware of their role in resolving challenges.
- Facilitate resolution of conflicts with contractors to avoid costly delays and arbitration.
- Assist with or perform commissioning services to ensure the realization of project goals and energy performance metrics.

The following table delineates the services, tasks, and deliverables required to deliver the project successfully:

## APPROACH TO OREGON CITY'S SCOPE OF WORK

PHASE I - PRE-DESIGN	PHASE II – DESIGN	PHASE III - CONSTRUCTION, CLOSEOUT, AND COMMISSIONING
INITIATION		
<ul style="list-style-type: none"> <li>Define scope and deliverables for Pre-Design activities</li> </ul>	<ul style="list-style-type: none"> <li>Define and formalize scope and deliverables for design</li> <li>Define operations and maintenance preferences and incorporate lessons learned from prior/ongoing Oregon City projects</li> </ul>	<ul style="list-style-type: none"> <li>Define scope, deliverables, and milestones for construction</li> </ul>
PLANNING		
<ul style="list-style-type: none"> <li>Develop work breakdown structure</li> <li>Define progress reporting requirements and establish protocol for routine progress meetings (bi-weekly), reports, and issue tracking</li> <li>Assist with or perform initial site visits and requirements generation utilizing our in-house engineering resources <b>(Value Added)</b></li> <li>Define stakeholders, prepare communications plan</li> <li>Prepare schedule, define decision points and milestones</li> <li>Prepare budget/operating cash flow projections, including spending projections through all phases</li> <li>Define goals for project sustainability, energy performance, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Update schedule according to input from the A/E team</li> <li>Refine and formalize project budget</li> <li>Plan process for employee and/or public involvement</li> <li>Refine and formalize project sustainability goals</li> <li>Incorporate Oregon City design standards into A&amp;E requirements</li> </ul>	<ul style="list-style-type: none"> <li>Define progress reporting requirements and establish protocol for progress meetings (weekly), reports, and issue tracking</li> <li>Review contractor schedule to identify critical path and opportunities/threats</li> <li>Manage budget and validate costs</li> <li>Prepare quality control/assurance plan</li> <li>Ensure commissioning specifications are incorporated into project</li> <li>Ensure contract structure is in place to achieve a zero accident project</li> <li>Identify and facilitate procurement of long lead time equipment to avoid delays</li> </ul>
EXECUTING		
<ul style="list-style-type: none"> <li>Complete due diligence</li> <li>Coordinate communications and documentation of Project activities</li> <li>Review Conceptual Plan and project to date</li> <li>Collaborate with staff and advise on project delivery system</li> <li>Prepare Procurement Exemption Findings (if appropriate)</li> <li>Prepare RFQ documents for design and general contractors (CM/GC, Design Build, or Traditional)</li> <li>Assist in Architect and Contractor procurement and negotiation process</li> <li>Evaluate sustainability goals and opportunities, enroll project with Energy Trust</li> <li>Research and advise on sustainability cost benchmarks and identify potential grant funding or incentives</li> </ul>	<ul style="list-style-type: none"> <li>Conduct bi-weekly project team meetings</li> <li>Actively manage project cost <b>(Value Added)</b></li> <li>Prepare/distribute meeting minutes</li> <li>Perform design and estimate review sessions for SD, DD, and 50% CD</li> <li>Facilitate value engineering conversations, including developing a VE log</li> <li>Perform constructability review</li> <li>Assist with stakeholder outreach and communications throughout</li> <li>Solicit third party contracts for the City</li> <li>Evaluate costs associated with identified sustainability benchmarks</li> <li>Assist with permitting process for land use and building permits</li> <li>Review and prepare bidding documents, and assist in procurement</li> <li>Continuously work with A/E as the City's primary point of contact</li> </ul>	<ul style="list-style-type: none"> <li>Conduct weekly coordination meetings</li> <li>Prepare/distribute meeting minutes</li> <li>Assist in bid analysis and selection for General Contractor and/or subcontractors</li> <li>Provide quality assurance to help ensure quality and compliance with the contract</li> <li>Continuously liaise with A/E &amp; Contractor</li> <li>Issue monthly budget report</li> <li>Review and process contractor progress and payment applications</li> <li>Review test reports and identify areas of non-conformance</li> <li>Track progress of construction, including on-site observation</li> <li>Assist Architect in preparation of responses to RFIs and coordinate resolution of issues</li> <li>Advise Owner of any special consultants and testing by third parties</li> <li>Assist with commissioning <b>(Value Added)</b></li> </ul>

PHASE I - PRE-DESIGN	PHASE II – DESIGN	PHASE III - CONSTRUCTION, CLOSEOUT, AND COMMISSIONING
MONITORING AND CONTROLLING		
<ul style="list-style-type: none"> <li>Assist with refinement of A/E and GC scope/ budgets during contract negotiations as well as serving as a resource in resolving any issues between stakeholders</li> <li>Manage separate due diligence contracts, if needed</li> <li>Interface with City Planning and Engineering Departments regarding Land Use review/ permits</li> </ul>	<ul style="list-style-type: none"> <li>Continuously monitor budget; review and approve all project design invoices for payment</li> <li>Continuously monitor schedule</li> <li>Continuously monitor correspondence between the project team and stakeholders</li> <li>Ensure design &amp; technical specs continue to meet user and stakeholder needs</li> <li>Track design issues and resolutions</li> <li>Track Value Engineering items, their values, and the analysis and decision points</li> </ul>	<ul style="list-style-type: none"> <li>Continuously monitor budget and review and approve invoice payments</li> <li>Continuously monitor schedule, especially for critical path, deliverables and milestones</li> <li>Continuously monitor correspondence, including Architect's approvals of shop drawings, product data and samples as well as Contractor RFIs</li> <li>Analyze and provide recommendations to Owner on change orders and/or claims, if any</li> </ul>
CLOSING		
<ul style="list-style-type: none"> <li>Ensure receipt and sign-off on all pre- design deliverables</li> </ul>	<ul style="list-style-type: none"> <li>Ensure receipt and sign-off on all deliverables</li> </ul>	<ul style="list-style-type: none"> <li>Assist with close-out activities including punch-listing activities, obtaining certificate of occupancy, etc.</li> <li>Ensure O&amp;M manuals, record drawings, key tools and spare parts, and warranty information are delivered</li> <li>Coordinate staff training on building systems</li> <li>Validate that proper Preventative Maintenance tasks are incorporated and clearly articulated in the O&amp;M documents <b>(Value Added)</b></li> <li>Ensure receipt and sign-off on all deliverables</li> </ul>

## PROJECT STAFFING

Our project team has been structured to ensure we can provide the proposed personnel to accomplish work items in a timely manner. The proposed staff are available to service the project and are **based locally within eight miles of the project site**. In addition, our cross trained staff implement a “no single point of failure” communications approach and are backed by the entire resources of the Firm. This ensures that if one team member is out of the office, the client is always supported.

### ***2. Services that may not have been mentioned and should be considered for inclusion in the final scope of work for the benefit of the project.***

In addition to the services outlined in the Project RFQ, PlanB recommends the following assistance for consideration:

## ESTIMATING AS PART OF THE APPROACH TO COST MANAGEMENT

In the current construction market, project budgets are increasingly tight. The PlanB team has a distinct advantage in having Quantity Surveyors (QS) in-house who

are highly trained to perform Owner's Representative duties and have the additional capability of providing all the cost management activities for the project. PlanB's Project Manager will be Gerard Mulrooney, who is a Quantity Surveyor with 15 years of experience providing the full suite of Owner's Representative services.

In addition to PlanB's typical approach to cost management, **we have the capability to provide full cost estimation for the project by providing third-party validation of project costs.** Detailed cost estimates allow us to analyze project costs and ensure the City is achieving maximum value for the available funding. This means cost certainty and peace of mind for the City.

## ENHANCED JOBSITE DOCUMENTATION

Utilizing tools such as Multivista to provide a series of as-built photos stored on a readily accessible web portal can improve future operations and maintenance services by providing robust documentation on as-built information and provide a usable repository for the Operation and Maintenance Manuals.



### ADVANCED OPERATIONS AND MAINTENANCE SUPPORT

In addition to providing Owner's Representative services, PlanB works with agencies to develop best-in-class asset management programs. This includes developing **simple and implementable asset management strategies and standards to ensure the agency can maximize the value of a facility across its life cycle.** For Oregon City, this could include validation of contractor provided Operations and Maintenance (O&M) Manuals and development of a tailored preventative maintenance schedule to quantify forecast ongoing O&M expenditures over the life of the facility. This Preventative Maintenance Schedule clearly outlines the weekly, monthly, quarterly, and annual maintenance requirements for the building and gives Operations staff the data necessary to plan and protect the City's capital investment through best-practice asset management.

---

### ***3. Opportunities to achieving project delivery in a timely manner***

---

Timely project delivery requires a thorough and thoughtful approach to project planning and execution. Detailed and comprehensive project planning can avoid critical "misses" and avoid significant project delays that can impact overall project schedule. PlanB are experts in project planning and management, using best practices from the Project Management Institute (PMI) to plan and execute projects. This begins by a robust process of project planning in collaboration with the City.

### OWNER'S REPRESENTATIVE: A COLLABORATIVE PROCESS

To facilitate a deeper understanding of the City's needs and goals for this project, PlanB would hold a kick-off meeting with the City of Oregon City, including key stakeholders. Led by PlanB's Project Manager, Gerard Mulrooney, and attended by key team members, the main purpose of the meeting would be to understand the City's needs, goals, transparency and decision making requirements and understand what outcomes you will measure success against. **These desired outcomes will be documented and continuously referred to as our means for ensuring your project meets and exceeds your objectives.** We strive to ensure that communications are clear, that the decision making process is well documented, and that the Project Management and Owner's Representative services can be executed in the most effective and efficient manner.

Part of this upfront collaboration will include facilitation of a simple assessment/validation of the facility needs and risks associated with this project. PlanB believes in identifying project risks at the beginning of the project in order to proactively manage them throughout.

### UPFRONT AND CONTINUOUS PROJECT PLANNING

After the initial kick-off meeting with the City, PlanB will dive heavily into the planning process. In our experience, thorough and thoughtful planning leads to smooth execution and a positive experience throughout the design and construction process.

Working collaboratively with the City, we will develop a comprehensive Work Breakdown Structure (WBS) using the scope of work in the request for qualifications as a baseline document. Developing this document collaboratively ensures that **all work items are captured, due diligence is performed, and that all stakeholders can approve the projected work items.** Using a responsibility matrix, each task is assigned a lead and allocated resources for completion. These tasks are then developed into a comprehensive cost loaded schedule, which our team will use to manage the project and update monthly as the project progresses.

### PRE-DESIGN DUE-DILIGENCE

After the up-front project planning sessions, PlanB will evaluate the project documentation and due diligence completed to date in order to develop a baseline project schedule and budget which will be used to manage the project throughout design and construction.

In addition, our team will work with the City to review the conceptual design and ensure it meets City needs and established best practices. Our team includes two registered professional engineers with experience in building operations and design. PlanB will also identify any additional due diligence needed prior to beginning design in order to procure and manage selection of additional vendors and consultants. Identifying additional due diligence needs early in the process provides the City an opportunity to get all of the technical studies completed early in the process so that the design team can begin design immediately after contracting.

### PROJECT DELIVERY METHOD SELECTION

The PlanB team are experts in procurement management with experience in a variety of project delivery methods. PlanB has worked with Clients to develop and solicit teams for construction projects in the Design, Bid, Build; Design/Build; CM/GC; and Public-Private Partnership method. The project delivery method has a large influence on the project's overall timeline and brings specific opportunities and risks. PlanB will work with the City to identify the procurement method most appropriate for the project's specific goals and constraints. For this project our team will:

- Discuss the merits of Design/Build and CM/GC over traditional acquisition methods.
- Inform stakeholders of project risks, and jointly select a procurement methodology.
- Prepare “Findings of Fact” documentation for City leadership to consider alternative procurement methods.
- Assist with RFP development for the A&E firms, contractor, and any specialty inspectors.
- Participate in site walks and spearhead the selection and negotiation process.
- Evaluate proposals based on determined selection criteria.
- Ensure a competent A&E consultant and contractor team is selected representing the best value to the City while minimizing project risk.

---

**4. Strategies that could be employed to meet project goals and objectives on time and within budget. Key points may include the availability of key personnel immediately and throughout the project, ability to control project schedule and cost, and internal quality control procedures.**

---

### COST MANAGEMENT

We take a holistic approach to design documentation and engage multi-discipline Quantity Surveyor (QS) teams who understand the purpose of a building and the components that make it up in its entirety, rather than single discipline estimators who are prone to function in silos. Key to achieving this is engaging with the design team to understand the concepts, environment, nature and functional requirements of a building and using our QS teams to ‘translate’ this into cost. Having this skillset on the City’s side means that **project costs will be verified throughout the project to ensure the proposed design is achievable given the project budget.** For this project, our cost management team can perform the following services, if needed:

- Project budget development, with estimated soft costs, contingencies, and spending projections throughout the project
- Shadow/should cost bid estimates
- Trend analysis/logs
- Life cycle costing
- Value engineering options
- Benchmarking/cost modeling
- GMP review and negotiation
- Invoice/billing management
- Change order management

One of the key differentiators of public versus private work is that the public sector provides a **great service to the community and population at large**, resulting in a different accountability hierarchy. Funding is often provided through taxes or bond issues and these are often out of sync with project phasing, which can lead to budget difficulties as the time span between these phases often run to years. Therefore contingency applications to represent risks in escalation, changing market conditions and labor availability are of paramount importance. Limited budgets, a high degree of visibility and scrutiny with a high service expectation from the community means the demands on these sectors’ employees are extremely high. **We appreciate that your project budget needs to account for these factors and are experienced in providing these services to our public clients.**

Specifically in relation to cost control, there are some areas that need to be kept in mind: key-stakeholder buy-in, budget accuracy and transparency, key performance indicators and the project’s impact on other aspects of the institution should be of key importance.

Without key-stakeholder buy-in, the project will hit speed bumps throughout, so it is important that these individuals or teams are fully invested in the process. Of critical importance to all construction projects is setting up to succeed, and **a key part of this is establishing an accurate budget and managing it throughout to ensure there are no surprises or inexplicable overruns.** One method we use to measure the success of a project is to implement key performance indicators early in the project, as these can form a critical path that, if met, will ensure the project and those associated with it trend for success.

### INTEGRATED DESIGN REVIEW AND COMMISSIONING SUPPORT

Our project team includes registered professional engineers and commissioning agents. While we are not designing the building, our experience allows us to provide critical input to the A&E team to ensure the best value systems are selected and installed. As such our team will:

- Review the SD, DD, and CD designs for completeness, constructability, energy efficiency, and maintainability.
- Work to ensure the systems selected meet immediate budgetary needs while providing the lowest life cycle costs.
- Review the energy usage of systems while paying particular attention to the controls sequence of operations.
- Perform or assist the City’s commissioning agent to perform pre-functional tests, functional tests, and ensure the building control system is properly programmed and maintainable.



### HANDS-ON CONSTRUCTION MANAGEMENT APPROACH

Successful construction projects are achieved by diligent upfront planning, ensuring the City has the contract “teeth” to enforce quality standards throughout design and construction, and also having the proper project controls in place during construction. We take a hands-on approach to get the work done. Nothing is more important than onsite field observations to ensure the project is on track and quality standards are being met. Our approach includes:

- **Weekly Site visits:** We will conduct weekly update meetings to discuss old news, new news, a two-week loop ahead, long lead items, change requests, and the issue log.
- **Onsite Documentation:** We will document site conditions using our in-house tablet technology to provide an accurate historical record of construction tasks and the percentage complete of tasks to ensure accurate monthly billing and forecast potential schedule overruns.
- **Track Construction Progress:** Our field visit information will feed into the detailed project schedule so that our team can monitor the schedule, track float and the critical path and inform the owner when necessary.
- **Quality Assurance:** Our team will verify that the installed work meets the design documents. Our experienced field engineers are familiar with all aspects of design and construction. Having our team involved throughout design helps ensure that work items installed are in accordance with the contract documents.
- **Issue Log/Punch List:** During the site visits, any item which is not installed per the plans and specifications will be documented on the issue log for resolution by the contractor. Our goal is to catch deficiencies early so that any cost or schedule impact can be mitigated without negatively affecting the project.

In addition to these weekly tasks, our team will perform the following items throughout construction to ensure a turnkey building is delivered:

### CHANGE ORDER REVIEW

- During our site visits, any upcoming change orders will be discussed with the contractor and field verified during our site visits.
- Proposed change order costs will be reviewed by our team, and negotiated working with the City.
- We review and validate architect responses to change requests working with third party designers and experts to develop implementable solutions if necessary.
- Our team contains **cost engineers well versed in change order management and review** that can adequately forecast the cost of work and negotiate working with the City.
- Using our approach **we have saved our clients millions of dollars** by negotiating change requests on their behalf.
- We will ensure the building stays within the proposed budget range.

### LAND USE AND PERMITTING SUPPORT

Having already worked with the City’s Planning, Engineering, and Building Departments, **our team’s established relationships with City staff** and understanding of the permitting requirements in Oregon City **will streamline the project’s process** for securing land use approval and key permits. Early in the process, **PlanB will incorporate lessons learned from ongoing projects** in and around Oregon City to make sure that the project’s plan for securing permits includes adequate time for internal city reviews and accurate budget line items for all permitting fees.



## C. Project Schedule

PlanB's team includes Scott Vernon, an expert in Project Controls and Scheduling for construction projects. With over 35 years of experience in the construction industry, Scott is an **expert resource in developing, tracking, and maintaining project schedule**. Based on initial milestones outlined in the RFQ, a preliminary project schedule is attached on page 9, assuming the CM/GC procurement delivery method. The City's past success managing CM/GC projects (Oregon City Library, Oregon City Police and Municipal Courts Building) make this procurement method a viable option for meeting the proposed timelines. Design/Build and traditional procurement methodologies bring their own opportunities and challenges, which will be discussed in detail with the City at the beginning of the project.

### OPPORTUNITIES AND THREATS

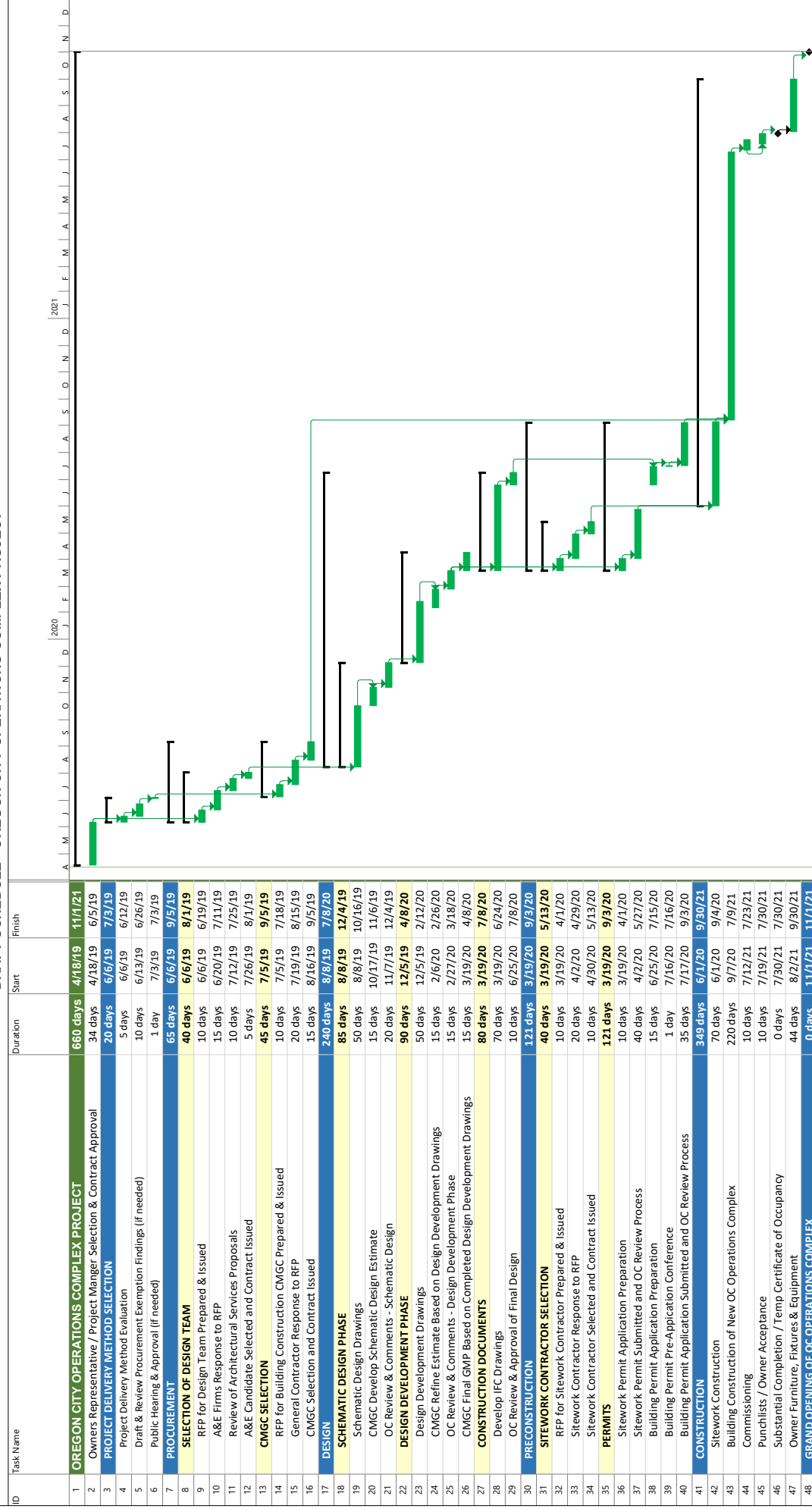
The City's proposed schedule anticipates completion in Fall 2021. In order to meet, or exceed, this expectation PlanB has identified **several opportunities to accelerate the project schedule**. First, the Project Delivery Method

will have large implications for overall project timelines. As noted in the RFQ, the potential use of the Design/Build or CM/GC project delivery methods can accelerate these timelines through the use of early work packages, up-front constructability reviews, integrated value engineering analysis, etc. As part of the upfront project planning, **PlanB will work closely with City staff to identify and define a clear project decision-making process**. Indecision during design can have a snowball effect on project delivery. Clear and informed decision-making will ensure the project team can stay on schedule while delivering a facility that meets all of the City's needs.

The schedule attached assumes the CM/GC delivery method as a starting point. Other opportunities for maintaining schedule include working closely with the City's planning and engineering staff to incorporate concurrent design reviews for key permits. **PlanB's existing relationships with City staff will ensure this coordination happens early and often throughout the design process.**



# DRAFT SCHEDULE - OREGON CITY OPERATIONS COMPLEX PROJECT



OC Operations Complex Project - Prelim Schedule - 04.16.2019

UPDATED: 4/16/19

PRELIMINARY PROJECT SCHEDULE

Page 1

Task Split Milestone

Summary Project Summary Inactive Task

Inactive Milestone Inactive Summary Manual Task

Duration-only Manual Summary Rollup Manual Summary

Start-only Finish-only External Tasks

External Milestone Deadline Critical

Critical Split Progress Manual Progress



## D. Proposer and Personnel Qualifications

With our qualified project team, we work with Owners to plan projects and invest effort up front to ensure the City can create right-sized facilities that will serve the needs of City and its constituents. Our team works to incorporate **our diverse skill set and problem-solving mentality** to ensure future project success through expert planning and risk reduction efforts. When it comes to project planning, an ounce of precaution can save a pound of headache. We embrace this mentality to ensure the construction projects we plan can be executed on schedule and on budget, meet the client's needs, and **provide the maximum value to our clients**. To accomplish this, our team consists of the following key personnel who are supported by the full breadth of PlanB staff.

### PROPOSED PROJECT TEAM

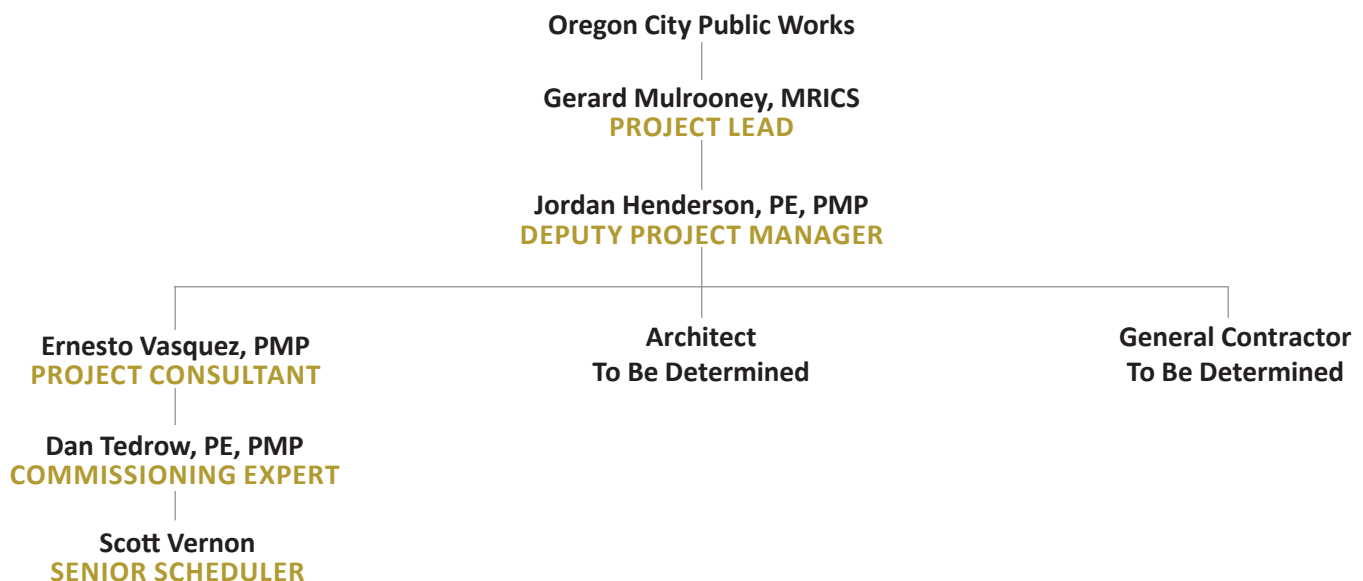
#### **PROJECT LEAD: Gerard Mulrooney, MRICS**

Gerard has developed a broad-based career in many sectors including High Tech, Governmental, Pharmaceutical and Commercial. His background and specialist expertise began in Quantity Surveying and life cycle costing but he has used his diverse experience to become a Project Manager and Lead Consultant. Gerard is the Project Manager for the Oregon City Police and Municipal Courts project, a project that has many similarities to the Operation Complex's needs and gives him a solid understanding of the values that matter to Oregon City. Gerard's comprehensive experience and technical cost estimating background make him an invaluable part of the team. Gerard also spent three (3) years in a project controls (Owner's Representative)

role with M+W Group in New York, and has previously performed project controls for the Leader in Silicon Innovation as well as delivering new campus facilities for Fettes College in the United Kingdom. Gerard, through his many projects as an Owner's Representative in a variety of delivery methods, has in-depth experience of project and construction management from planning and entitlement, pre-development and design review, and oversight during the construction phase through project close-out.

#### **DEPUTY PROJECT MANAGER: Jordan Henderson, PE, PMP**

Jordan is a Professional Engineer (Civil) and Project Management Professional (PMP) with experience in delivering capital projects of varying sizes through planning, permitting, design and construction. Jordan is currently the Deputy Project Manager for the Oregon City Police and Municipal Courts Building Project and has been part of the PlanB team for projects with the City of Milwaukie, the Oregon Department of Transportation, and the City of Portland. He also worked as part of the Owner's Representative team for Multnomah County's Sellwood Bridge project. Jordan is a strong team player, and uses his background in engineering to communicate across multi-disciplinary teams to ensure the client's goals are met throughout the project. This includes communicating project progress updates to large groups of stakeholders and providing confidence to the owner that critical issues are identified and managed throughout design and construction. Jordan has experience using technology (Smartsheets, Microsoft Products, Bluebeam, etc.) to facilitate collaboration between team members.





### **PROJECT CONSULTANT: Ernesto Vasquez, PMP**

Ernesto is an experienced Project Manager with a background in managing large scale projects from initiation to completion. Ernesto's expertise is in project controls and construction management provides the City with an experienced resource to support the project from beginning to end. Ernesto will support key efforts such as proactively managing costs, developing and enforcing contracts, reviewing bids, monitoring construction, and management.

### **COMMISSIONING EXPERT: Daniel Tedrow, PE, PMP**

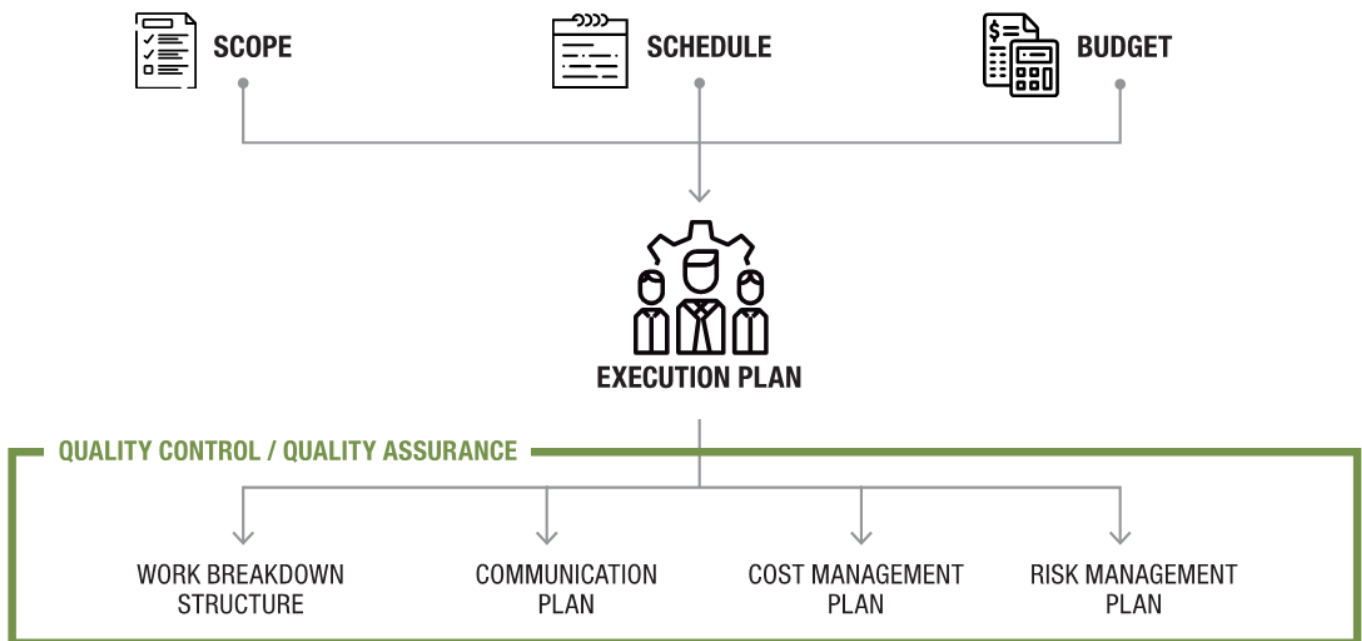
Dan, as Associate Partner, leads PlanB's Integrated Services group and is an experienced project manager with a proven ability to deliver projects for large organizations on time and on budget. He brings a broad range of skills and expertise, which include full understanding of the complexities and interdependencies of quality, cost and time in construction. This has led to him becoming a very well rounded project lead with valuable insight into the workings of a project and an innate understanding of where and how to get results. A registered mechanical engineer, Dan worked for the US Navy for six years designing, owning, operating, commissioning, and maintaining facilities, many of which met rigorous environmental standards, including 13 LEED

certified buildings, and two LEED Platinum projects. Dan brings an in-depth knowledge of project management, organizational change management, facilitation strategies, facilities operations, and international best practices for facilities management. Dan is also experienced at developing and evaluating facilities operations IT tools, providing project commissioning, and implementing cost saving solutions.

### **SENIOR SCHEDULER: Scott Vernon**

Scott has over 35 years of experience in the construction industry including extensive experience working with governmental agencies including King County, WA. He has provided project management, construction management, project controls and scheduling services to several companies, helping them to deliver accurate and dynamic information to realign projects that have gone astray or to keep projects in alignment with their goals. Scott is additionally certified as a Primavera Contract Manager and is a trainer for Oracle/Primavera Systems. Scott is also an expert in Microsoft Project to prepare and manage project schedules for the Project Team.

## **OWNER'S NEEDS AND EXPECTATIONS**



## E. References and Past Experience

### Oregon City Police And Municipal Courts Building OREGON CITY, OR



Source: FFA Architecture and Interiors

**CLIENT:** City of Oregon City

**ROLE:** Project Management/ Owner's Representative Services

**PROJECT DURATION:** Spring 2018 to Fall 2020

**CLIENT CONTACT:** Jim Band, Chief of Police, 503-496-1686, jband@orcify.org

**TYPE:** Public sector

**KEY STAFF:** Gerard Mulrooney, Jordan Henderson, Daniel Tedrow

Through a successful voter bond appeal, the City of Oregon City is in the process of designing and constructing a new Police and Municipal Courts Building. The new facility on the site of the former Mt. Pleasant Elementary School will provide a modern and resilient police building. The project is using the Construction Manager/General Contractor (CM/GC) method. PlanB's services include development and management of the project budget and schedule, contract and fee negotiations for selection of the design and CM/GC team, facilitation of design and construction team meetings, permitting coordination, vendor selection and management, contract negotiation and administration, document review and more.

The new Courthouse will house both the Police Department as well as the City court staff (judges, clerks, etc.), so there are many stakeholders, as well as existing services. Part of PlanB's role for the client is to assist in addressing the public, so accountability and transparency are of paramount importance. To keep everyone informed, PlanB has monthly meetings where we present monthly reports. We worked to finalize the various studies necessary before the construction phase, including topography and hazmat studies. Working with many stakeholders and keeping them informed of every stage of a project is well within PlanB's experience and one of our many successes.

### City of Tualatin – Tualatin Service Center Project TUALATIN, OR



Source: SRG

**CLIENT:** City of Tualatin

**ROLE:** Project Management/Owner's Representative

**PROJECT DURATION:** February 2019 to Fall 2020

**CLIENT CONTACT:** Clayton Reynolds, Maintenance Services Manager, 503-691-3099, creynolds@tualatin.gov

**TYPE:** Public sector

**KEY STAFF:** Gerard Mulrooney, Jordan Henderson

PlanB is currently working with the City of Tualatin as Project Managers / Owner's Representatives for the design and construction of a new public works building. The project, called the Tualatin Service Center Project, intends to combine all Community Development and Maintenance Services at one location. The Project will expand the Operations Facility allowing space for the relocation of Community Development, Engineering, and Building Division from City Offices. The initial project plan includes demolition of existing warehouse space, site improvements to improve fleet parking, and a new two-story office space for City staff.

PlanB is currently guiding City leadership through a process of selecting a preferred project delivery method and documenting findings in support of the proposed Construction Manager / General Contractor (CM/GC) method. At the same time, PlanB is leading the process of developing request for proposals and selecting the project team with the goal of beginning design in May 2019.

Plan text amendments and an employee engagement process to reach buy-in with relocated staff are going to be key tasks for PlanB throughout this project in addition to managing a tight timeline and firm budget target.

**University of Portland, Franz Campus on the River**  
**PORTLAND, OR**



**CLIENT:** University of Portland  
**ROLE:** Project Management/Owner's Representative Services  
**PROJECT DURATION:** November 2017 to October 2021  
**CLIENT CONTACT:** Jim Ravelli, VP Operations, 503-943-7540, ravelli@up.edu  
**TYPE:** Private sector  
**KEY STAFF:** Gerard Mulrooney

The University of Portland has experienced exponential growth over the past 15 years. After many years of negotiation, the University was able to acquire additional property, which will grow the athletics footprint as well as relocate the physical plant. PlanB has been hired to partner with the University as the program manager for the more than five major components which will complete the new River Campus. Currently under design are a new tennis facility, a row center, a track and field project, and a physical plant building, which is a two-story, tilt-up construction and will house all key campus Maintenance and Facilities staff and equipment. Utility and infrastructure requirements for the development are also part of this project. PlanB created budgets and schedules for this work and is managing against the University's initial targets.

PlanB is the program manager overseeing all aspects of design, schedule, and cost management on the project. Our team works as the Owner's primary point of contact to interface with the multitude of design teams, contractors, sub-consultants, stakeholders, legal representatives, and public agencies such as the City of Portland to ensure the project is delivered at the best possible price with the highest quality. To do this, our team has worked with University of Portland staff to optimize the procurement process, negotiate with sub-consultants and A&E teams to obtain bids and design services, and worked as the coordinator for permits and greenway review to keep the five construction projects on schedule.

**King County Wastewater Treatment Project**  
**Controls - Loop Vehicle Maintenance Facility Project**  
**Development and Planning SEATTLE, WA**

**CLIENT:** King County  
**ROLE:** Owner's Representative  
**PROJECT DURATION:** 2008 - 2016, 2018 - 2021  
**CLIENT CONTACT:** Ellyn Rose, Project Control Engineer III, 206-477-5445, ellyn.rose@kingcounty.gov  
**TYPE:** Public sector  
**KEY STAFF:** Daniel Tedrow, Scott Vernon

PlanB is providing Owner's Representative services for projects delivered on a work-order basis. The breadth of the work includes project management, scheduling, cost estimating, risk management, risk-based cost estimating services, IT solutions, contract compliance review, document control, writing scopes of work, work flow optimization (LEAN), change management, conceptual design, and training of King County staff on a variety of construction projects from concept through construction close out.

One particular work order completed was the LOOP Vehicle maintenance facility. The existing Maintenance facility was 60+ years old and did not meet the current needs. PlanB was approached to develop a cost estimate to replace the facility. Upon inspection it became apparent that the replacement facility's requirements were unclear, so PlanB proposed an integrated approach. A site walk was performed and multiple discussions were held with operators and industrial workflow consultant was engaged to provide best practices for tool layout, pit locations, and where to locate the parts rooms and other critical maintenance functions. In addition, we identified similar maintenance facilities to determine the cost of construction and capture any lessons learned from the operators and construction teams. From this information a 3D mockup of the replacement building was developed, as well as a comprehensive requirements document. From this information a 3D mockup of the replacement building and a comprehensive requirements document were developed, which were then used to develop an accurate replacement cost. We could then convey to County stakeholders what the project requirements were and gave a visual example of the replacement facility. The project is currently under design.

## **F. Personal Service Contract Terms**

PlanB Consultancy is currently working for the Police Department using the City's standard Personal Services Agreement and does not have any requested modifications to contract for this project.





## Gerard Mulrooney, MRICS | PROJECT LEAD

*Gerard is an experienced project manager as well as a senior quantity surveyor and cost estimator with over 15 years of broad experience in many sectors including high technology, public sector, pharmaceutical and commercial in both the UK and USA. His background and specialist expertise began in quantity surveying and life cycle costing in the UK but he has used his diverse experience to become a project lead after transitioning to the USA. Gerard brings a broad range of skills and expertise which include full understanding of the complexities and interdependencies of quality, cost and time in construction.*

### EDUCATION

Bachelor of Science (Honors)  
Quantity Surveying  
Edinburgh Napier University

### AFFILIATIONS

Member of Royal Institution  
of Chartered Surveyors (RICS)  
(#11901081)

## Relevant Experience

### University of Portland, Franz Campus on the River, PORTLAND, OR

PlanB, led by Gerard as Project Manager, was hired to partner with the University as the program manager for numerous major components which will complete the new River Campus. Currently under design are a new tennis facility, a boat house and rowing center, a track and field project, and a new physical plant building. The PlanB team is managing the client's budgets and schedules for this scope in concert with the University and their targets. Gerard is the main point of contact between design teams and the University, assisting with the full suite of Owner's Representative services including the organization of meetings, reviewing of documents and change orders, implementation of contracts, budget review and management, and schedule review and management, as well as liaising with the Client's legal representatives.

### Oregon City Police and Municipal Courts Building, OREGON CITY, OR

Gerard is serving as Project Manager for the Oregon City Police Department's Police and Municipal Courts Building Project. As Owner's Representatives and Project Managers, PlanB is providing services include development and management of the project budget and schedule, contract and fee negotiations for selection of the design and CM/GC team, facilitation of design and construction team meetings, permitting coordination, vendor selection and management, contract negotiation and administration, document review and more.

### GLOBALFOUNDRIES, Various Projects, ALBANY, NY

Gerard consulted with GLOBALFOUNDRIES and one of its general contractors since 2014. Acting as project cost controls lead, he managed the cost control process on site for the 8.1 EXT PLS Extension, S19 Warmdown, and S19 IPD Base Build and Tool Install projects. Gerard worked closely with this client and the partners involved. He provided early cost and budget advice to ensure that estimates are managed and aligned with local factors including; labor pool, material supply issues and market conditions alignment. His role also included pre and post contract forecasting and budget control, working closely with the partners in evaluating estimates and changes while maintaining the key principles of an Integrated Project Delivery process.

### Leading Company in Silicon Innovation, HILLSBORO, OR

Gerard served as a liaison between Portland, OR and a team of quantity surveyors in Edinburgh, Scotland. In this role he assisted with the estimating of numerous new construction projects for the Hillsboro campus. Gerard relocated to Oregon to better support the estimating efforts he was involved in and used the opportunity to become part of the cost management site team on a new Manufacturing Support Building project (MSB).