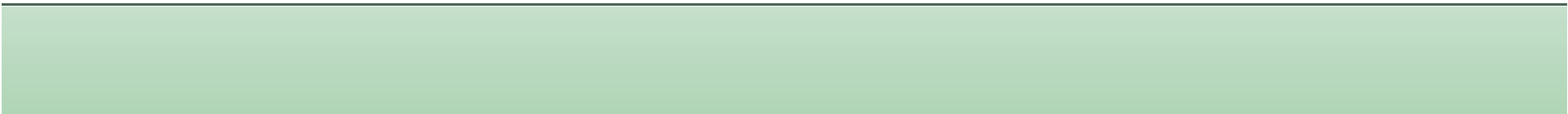




Lessons Learned

Prime Contractor Development Program

Stacey Drake Edwards
Program Coordinator





PRESENTERS

- Neil Choate, Lead Inspector - Bureau of Environmental Services
- Stacey Drake Edwards, PCDDP Coordinator – Procurement
- Melinda Dailey, Executive Director - Northwest Utilities Contractors Association
- Pete Hesford, Program Manager – Bureau of Environmental Services
- Mary Kapelczak, PCDDP Administrator, Procurement
- Roy Martinez, Public Works Inspector Supervisor – Bureau of Water
- Daniel Tarifu, Program Manager - Bureau of Environmental Services
- Louise Tamiesie, Contractor Prequalification Specialist - Procurement
- Joe Sandvig, Compliance Specialist/Payroll Auditor – Dept of Revenue



AGENDA

1. Introductions
2. Program Updates
 - ✓ Performance Measures – Where are we?
 - ✓ Upcoming Projects
 - ✓ Current Training Opportunities
 - ✓ Administrative Clean Up
3. Prequalification – What you need to remember
4. Project Highlighted – Project Managers
5. City Inspectors – Reporting, Safety, COP Expectations
6. Guest Speaker - Greg McAllister – Oregon Department of Revenue
7. Membership Opportunities - NWUCA



Program Performance Measures

Matriculations into Tier 2 and Tier 3:

Criteria Used:

Into Tier 3:

- ✓ Bid Ratio – Contractors bid to win ratio on program, city and other projects.
- ✓ Financial Z Score
- ✓ Prequalified
- ✓ Training Agent (non-union shop)
- ✓ Interise Graduate
- ✓ Review Attendance Records for Mandatory Trainings and Post Project Reviews

Into Tier 2:

- ✓ Bid Ratio – Contractors bid to win ratio on program, city and other projects.
- ✓ Financial Z Score
- ✓ Years in the Program
- ✓ Review Attendance Records for Mandatory Trainings and Post Project Reviews



Upcoming Projects

- Building Alterations

- | | | |
|-------------------------------------|----------|---------|
| ● Inverness 30-in Force Main Repair | Tier 1 | 4/27/15 |
| ● East Precinct – AC Replacement | Tier 1 | 7/1/15 |
| ● North Precinct AC Replacement | Tier 2/3 | 8/30/15 |
| ● The PB Elevator AC Replacement | Tier 2/3 | 8/1/15 |

- Sewer and Water

- | | | |
|--------------------------------|----------|---------|
| ● Crystal Springs Green Street | Tier 2/3 | 3/16/15 |
| ● Hollywood Stormwater & Sewer | Tier 2 | 6/9/15 |
| ● NW Hermosa Blvd Sewer Rehab | Tier 2/3 | 4/27/15 |

- Street Improvement

- | | | |
|--------------------------------------|----------|--------|
| ● Road 1010 MP 8.75 – Rehabilitation | Tier 2/3 | 5/4/15 |
|--------------------------------------|----------|--------|

- Park Improvements

- | | | |
|---------------------------------|----------|--------|
| ● April Hill Park Imprv/Restore | Tier 2/3 | 5/8/15 |
|---------------------------------|----------|--------|



Training Opportunities

- **Technical Assistance:**

- Project/Construction Management (Cos, RFIs, Submittals, Payapps)
- Critical Path Method Scheduling
- Bidding/Estimating
- Job Costing/Quickbooks
- Software Related Training – Excel, Word, Access, MS Projects, Heavy Bid

- **Leadership/Professional Development – NWCC**

- Criteria for Approval
- Submission of competitive bids on 3 or more projects, within in a year
- Won at least one project during the requested year
- Graduated from Interise Streetwise MBA program
- Prequalified with City of Portland
- Attended Mandatory City Led Workshops and Quarterly Lessons Learned



Administrative Follow Up
Mary Kapelczak
PCDP Administrator



City of Portland Prequalification
Louise Tamiesie
Contractor Prequalification Specialist



Prequalification for PCDP Contractors

Required for Bids valued at **\$250,000 or greater**

Process:

Fully completed application with enough project history to show your company's capacity, requires bond letter

when requesting bidding limits – the Board wants to see completed projects similar in size and scope

contractors should request prequalification in those classes where their company performs the actual work – not classes performed by subcontractors



Prequalification for PCDP Contractors

When deciding on which classes of work to request choose the type of work your company performs most often.

2 - STREET IMPROVEMENTS

MAY INCLUDE: **excavation and grading**, drainage such as per-pipe, inlets and leads, placement of fabric and rock, **construction of curbs, sidewalks**, driveways, and other related flat-work facilities, **AC paving** and pavement striping. May also include various types of structures such as segmental retaining walls, **light and signal pole foundations**, vaults and **electrical work related to lights** and signals, **irrigation, landscaping**, multi-use paved trails and **water quality as related to green street construction in the right of way (swales)**. May encompass other aspects and work items related to Street Improvements.

Project History examples

PROJECT #37	Name, Address, Contact Name & Phone No. of Owner	City of Portland Work Class(es)	Contract \$ Value (broken out per class)	Month & Year Completed	Prime, Sub Joint Venture
a.	City of Dallas, OR 187 SE Court Street Dallas, OR 97338 Fred Braun, 503.831.3555	2	\$613,028	November 2013	Prime
Prime Contractor or Architect/Engineer Name & Phone No. (if applicable)		Description of work you performed		Project Location	
b.	N/A	Full Street reconstruction and improvements. Excavation & Grading, new Concrete ADA ramps and walks, new light poles, asphalt paving and striping, in addition to storm drain work.		Dallas, OR	

Project #11	Owner Name, Address, Project Contact Name & Phone #	City of Portland Work Class(es)	Contract \$ Value (Broken Out Per Class)	Month & Year Completed	Prime, Sub or Joint Venture	% of DMWESB Subcontractor Utilization
	City of Portland, 1120 SW 5th Ave., Portland, OR. 97204 Slavik Dezhnyuk, (503) 823-7161	1,2,3,8,41	1 - \$50,000.00 2 - \$2,608,000.00 3 - \$475,000.00 8 - \$2,787,000.00 41 - \$430,000.00	Ongoing Estimated Completion October 2014	Prime	12%
Prime Contractor or Architect/Engineer Name & Phone No. (if applicable)		Description of Work you Performed		Project Location		
	City of Portland, Steve Townsen, (503) 823-7144	Improvements to the sewer system, add new green stormwater management infrastructure, improve the streetscape and reconstruct streets on SE division from 11th ave. to SE Cesar Chavez Blvd. Installation of sewer and storm piping, stormwater management facilities, curbs, sidewalks, and paving. Construction of a combined sewer system, approximately 7,800 LF of 6-inch through 15-inch PVC (6"-2,300 LF, 8"-342 LF, 10"-1,946 LF, 12"-2,640 LF, 15"-546 LF). Construction of a storm water drainage system, approximately 1,700 LF of 18-inch through 60-inch RCP (18"-345 LF, 30"-10 LF, 48"-1,235 LF, 60"-105 LF). Construction of storm water planters including concrete walls, inlets, piping, and soil backfill. Construction of concrete foundations for stone artwork.		Division St. Reconstruction Project: SE 6th - SE 39th Portland, OR.		

PROJECT # 6	Owner Name, Address, Project Contact Name & Phone #	City of Portland Work Class(es)	Contract \$ Value (broken out per class)	Month & Year Completed	Prime, Sub or Joint Venture	% of DMWESB Subcontractor Utilization
	PacificCorp – Merwin Lake Park 825 NE Multnomah Suite 1500 Portland, OR 97232 David Moore 503 813-6045	7,11,19,22,27 29,30,42	25k,25k,100k,10k, 75k,30k,35k,30k	October 2012	Sub	6 %
Prime Contractor or Architect/Engineer Name & Phone # (if applicable)		Description of work you performed			Project Location	
JR Merit Inc PO Box 940 Vancouver, WA 98666 Mark Radich or Burt DeGraw 360 693-7474		Lake Side Park Project			Clark/Skamania County	

PROJECT # 5	Name, Address, Contact Name & Phone No. of Owner	City of Portland Work Class(es)	Contract \$ Value (broken out per class)	Month & Year Completed	Prime, Sub Joint Venture
a.	Rogue Valley International Airport 1000 Terminal Loop Medford, OR 97504 Ben Case 541-776-7222	4	\$729,829	October 2009	Sub
Prime Contractor or Architect/Engineer Name & Phone No. (if applicable)		Description of work you performed			Project Location
b.	Knife River Construction Medford Dave Butler 541-664-4567	14,000 sy of reinforced concrete paving at the Medford Airport			Medford, OR

PROJECT # 18	Name, Address, Contact Name & Phone No. of Owner	City of Portland Work Class(es)	Contract \$ Value (broken out per class)	Month & Year Completed	Prime, Sub Joint Venture
a.	Oakleaf Property Management 2350 Oakmont Way Eugene, OR 97401 Steve Korth, 541-485-4711	42	\$198,800	September 2010	Prime
Prime Contractor or Architect/Engineer Name & Phone No. (if applicable)		Description of work you performed			Project Location
b.	N/A	40,000 sf Asphalt parking lot, reconstruction and repaving at the Albany Bi-Mart			Albany, OR



Lessons Learned – Guest Speaker

Joe Sandvig
Compliance Specialist/Payroll Auditor
Oregon Bureau of Revenue



Lessons Learned – Project Manager

- Pete Hesford, Project Manager – BES
- Daniel Tariku, Project Manager - BES



Project Manager – Lesson Learned Segment
BES Project Manager – Pete Hesford

Emphasis on the “Prime”

- Know your subs
 - Develop Critical Path Schedule with Subcontractors and Material Suppliers
 - Make sure it will work
 - Make sure everyone is onboard – include contract clauses to protect the schedule
 - Incorporate City of Portland Contract language into Subcontracts and Purchase Orders – provisions for deliverables (Liquidated Damages)
- Manage your subs
 - Know their work; schedule, de-conflict and supervise their work
 - Don't be afraid to leverage Liquidated Damages to ensure performance
 - Do not say to the COP PM, “Can you speak with my sub...”



Project Manager – Lesson Learned Segment
BES Project Manager – Pete Hesford

Collaborate / Share Experience

- Standard Submittals (UPP, SSSHP, Erosion Control Plan)
- Complex Submittals (Traffic Control Plan, bypass pumping)
- Agency Collaboration (ODOT, PBOT, PWB)



Project Manager – Lesson Learned Segment
BES Project Manager - Daniel Tariku

The BES Construction Management and Inspection project team has an expectation, internally, to meet a percentage of time/cost allotted on each project.

These can be exceeded due to these two areas that I will address today:

- Concerns:
 - Paperwork
 - Work Quality



Project Manager – Lesson Learned Segment
BES Project Manager - Daniel Tarik

Solutions:

- PCDP provide technical assistance and mandatory City led workshops in:
 - BES Specs and standard city requirements across most projects.
 - Identify forms that are needed, i.e. payapps, schedules.

- Examples



Lessons Learned – City Inspector Spotlight

Neil Choate, Lead Inspector
Bureau of Environmental Services

Roy Martinez, Public Works Inspector Supervisor
Bureau of Water



Inspector Spotlight

PWB Inspection Forms:

- BES General Daily Progress Report
- Erosion and Sediment Control Inspection Report
- Water Bureau Inspector Installation Report
- Daily Record of Claim for Additional Compensation
- Flagger Receipt
- Hydrostatic Leakage Test
- General Daily Progress Report
- Portland Water Bureau Laboratory – Project Back Samples
- Material Inspection Report



BES General Daily Progress Report

Project Number: E10357

Project Information

Date: February 2, 2015 Mon. Report Number: 59

Project Name: Kenton Sewer Rehabilitation

Prime Onsite Supervisor:	Chris Hage	Prime:	[Redacted]	Time:	7:00AM-3:30PM
BES Construction Manager:	Brad Huard	Sub (A):	[Redacted]	Time:	8:00AM-3:00PM
Sr. Inspector:	Curt Obermeyer	Sub (B):		Time:	
Inspector:	Cedar Nickels	Sub (C):		Time:	

Weather

Conditions: Cloudy Temperature: 40-51°F

Work Area

SHT:	C11	Location:	N. Schuyler	Activity:	Lateral replacement
SHT:		Location:		Activity:	
SHT:		Location:		Activity:	

Personnel

P ri m e : P ri m e : P ri m	Superintendent	To	1	Sub (A):	---	T	---
	Operator	tal	2	Sub (A):	---	o	---
	Laborer	:	1	Sub (B):	----	t	--
	Truck Driver	To	1	Sub (B):	----	a	--
	Apprentice	tal	1	Sub (B):	---	l	---
	---	:	---	Sub (B):	---	:	---
	---	To	---	Sub (C):	---	T	---
	---	tal	---	Sub (C):	---	o	---
Truck Driver	:	1	Sub (C):	---	t	---	
----	To	--	Sub (C):	---	a	---	
	tal				l		

Equipment

Case 580 backhoe, cat 305E mini exc., 10 yard solo truck, F450 and F350 crew truck, case 580 back hoe, CAT 544 loader, 10 yard solo truck, Komatsu PC45 mini exc., Dynapac 002 roller, superior DT80J broom,
Sub A: 10 yard solo truck, CAT 930 loader Sub B: paving machine, CB34 roller, (2) 10 yard solo trucks

Temporary Traffic Control

Issues:

No

Submittal #:

8.27

--

Erosion Control

Issues:

No

Submittal #:

2.2

--

Materials Recieved

Issues:

No

Submittal #:

MHAC

--

Contaminated Media

Issues:

—

Submittal #:

N/A

--

By-Pass Pumping / Dewatering

Issues:

No

Submittal #:

N/A

--

Safety

Issues:

No

Submittal #:

4

--

Testing

N/A

Daily Progress

[REDACTED] had a crew of six people on site led by Superintendent [REDACTED]

The crew continued installation of laterals on North Schofield/C11.

Address 2448 STA 3+82L D=10.8', d=7.1. 19.1' of 6" PVC installed to curb with a 6" cap. Trench cut to 3' wide.

Address 2432 STA 3+03L D=10.5', d=5.4'. 20' of 6" PVC installed connecting to 4" ABS at an existing clean out. This lateral was 1.5' West of the clean out lid in the right of way and paint marks, and directly under the water line. The trench was originally cut to 3' wide and was kept at that width.

Both laterals were D bedded, knifed in, and backfilled with fill sand. Compaction with 580+hoe pack. +/- 12" base rock installed.

At address 2438 STA 3+33 the contractor excavated 7'X3'X10' deep without locating the existing sewer service. The trench was widened to 7' at the curb and tapered to 5' wide. The contractor used a push camera in the sewer lateral for address 2432 and confirmed that it wasn't a partied service. They also located the 6" clay lateral shown to be going to 2438 and confirmed that it is indeed capped just as Bravos TV report states (Bravo did indicate the existence of a lateral within their trench line with a white paint mark but not the correct mark for a capped line). This work began at approximately 9:00AM and continued intermittently until 2:00PM. The trench was backfilled from 2:30PM to 3:00PM.

All three trenches were temporarily paved with HMAC before the street was opened up.

Visitors

N/A

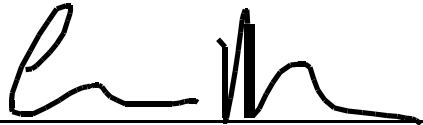
Lessons Learned

Additional Forms Forthcoming :

- Punch List
- Deficiency list
- Work Record
- Air Testing
- Pay Items
- Incident form
- Force Account
- Erosion Control
- Receivables
- Flagging Ticket
- Cure Log
- Contaminated Media

Inspection Hours: Start: 8:30AM Stop: 3:30PM Shift: Day

Inspector:



February 2, 2015

Cedar Nickels

Sr. Inspector:



2/4/15

Curt Obermeyer

Construction
Manager:

Brad Huard

Page:

TRENCH PROFILE

Plan Sheet:

MH: to MH

Station:

Surface: —

Baserock: —

Soils:

Soils:

Bedding type: "A" Bedding

Pipe Dia.: —

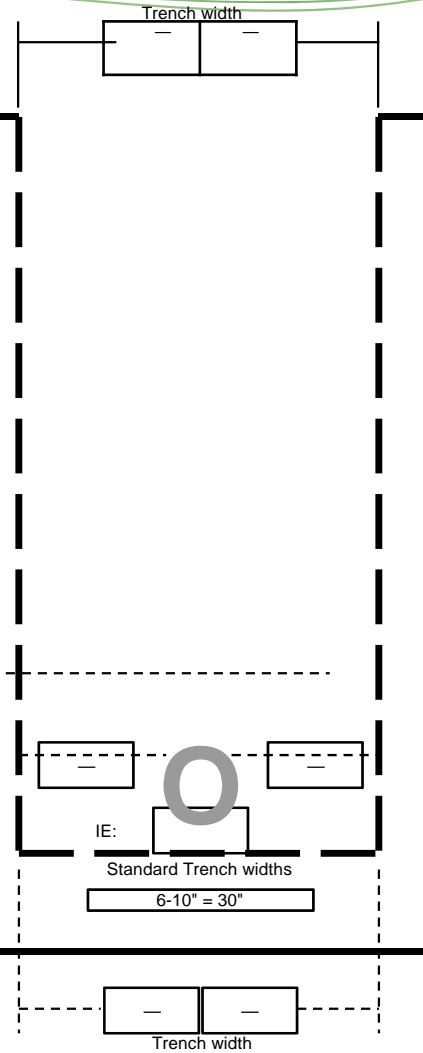
Stab.: —

Shoring: Speed Shoring

Sheets used in combination?: Yes No

Engineered Shoring?: Yes No

Backfill:



Page:



Description : 6" cap with PT 2X4 at curb

Location: 2448 N. Schofield/STA 3+82L



Description : Connection at mainline

Location: 2448 N. Schofield/STA 3+82L



Description : Connection at curb

Location: Address 2432/STA 3+03L



Description : Sewer directly under water line

Location: 2432/ STA 3+03



Description :

Lateral 1.5' West of clean out lid and paint Mark, just outside trench

Location:

2432/ STA 3+03



Description :

Approximately 16CY of material removed/backfilled with sand

Location:

2438/ STA 3+33L

Description :

Location:

Description :

Location:



Description :

Location:

Description :

Location:

Description :

Location:

Description :

Location:



Inspector Spotlight

- **Safety Tips**



Lessons Learned – Membership Opportunities

Northwest Utility Contractors Association
Representing Oregon & SW Washington

Melinda Daily
Executive Director



Networking