Best Value Procurement & Project Delivery

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Research Background

• Worldwide leader in Value-Based Project Delivery
  ▪ 18 Years
  ▪ 210+ Publications
  ▪ 550+ Presentations
  ▪ 1600+ Projects
  ▪ $5.7 Billion Services & Construction
  ▪ 98% Customer Satisfaction
  ▪ Awards: PMI, NIGP, IFMA, COAA, IPMA
  ▪ Owners: Federal, State, Local, Private
How Client Organizations work with us

• Desire to test BV concepts within their organization

• Form a Strategic Research Partnership with ASU
  – Strategic Plan, Contract, education efforts, project training, etc.

• Identify/self-identify champion(s) of pilot / core group
  – Ensure proper executive level support

• Choose a test project or projects
  – Project team, needs, baseline metrics, etc.

• Initial Efforts & First project(s)
  – Strategic Plan w/ metrics
  – Step-by-step assistance, educate heavily all along the way, support all aspects of the project, etc. etc.
How Vendors/Suppliers work with us

- Desire to master BV concepts within their organization
- Form a Strategic Research Partnership with ASU
- Identify/self-identify champion(s) of pilot / core group
  - Trainers/BV-SME (& ensure proper executive level support)
- Implement
  - Concept Education/Leadership
  - Competitive Proposal Response Techniques
  - Preplanning Tools, Processes, & Education
  - Performance Measurement & Management
  - Client Education
    - During Interview/Potential Preplanning
    - Existing/Potential Clients
Agenda

• Topics:
  – BV Procurement
    • Challenges in Traditional Proposal Processes
    • Value-Based Differentiators
  – Considerations for Holistic Project Delivery
    • Pre-Planning Techniques
    • Project Control & Risk Management Systems

• Presentation Structure:
  – Best Value Process Steps vs. Best Practices identified in Research (LL’s)
  – Owner & Supplier perspectives
Challenges we have seen in the proposal process...
Challenges we have seen in the proposal process...
What we have seen...
“The Greatest Risk that I always face is how to accomplish all of the things that our sales team promised we could do.”
We Know: Suppliers are Not a Commodity

...but how do we know who to select?
Common Evaluation Frustrations

- Marketing Information – cutting through the “fluff”
- Lengthy proposal binders
- Lack of project-specific information (supplier trying to sell the owner what they think the owner wants to hear)
- Difficulty in conducting evaluations
- Challenging to justify selection
What is different...
Value-Based Project Delivery

**Objective:** minimize cost by increasing efficiency

- Holistic view of the contract lifecycle
- Link procurement to operational performance
- System to promote sustained performance
Value-Based Project Delivery

1. Differentiate Expertise: within a value proposition
1. Differentiate Expertise: within a value proposition

2. Pre-Planning Before Award: focused on operational risk
Value-Based Project Delivery

1. Differentiate Expertise: within a value proposition

2. Pre-Planning Before Award: project teams - focused on operational risk

3. Performance Measurement: track risks & impacts to operational plan
DOES NOT CHANGE...

- Specifications
- Terms and Conditions
- Insurance & Bonding
- Contract
- Delivery System
- Pricing / Financials

Overlays on top of these...
Value-Based Project Delivery

Must be a win-win scenario

- **Owner** - minimize the risk of non-performance
  - Greater value for cost
  - Differentiate key individuals & leverage expertise
  - Become a client of choice

- **Vendor** – minimize client management & decision-making
  - Ability to lay out the optimal operational plan
  - Identify any support needed from the client
  - Maximize profit by being more efficient
1. **Differentiate Expertise:** within a value proposition

- Identifying, prioritizing, and minimizing project risks
- Opportunity to propose value added options
- Interviewing approaches & structures
Value-Based Project Delivery

**Filter 1**
Proposal Evaluations

**Filter 2**
Interview Key Personnel

**Filter 3**
Prioritization (Identify Best Value)

**Filter 4**
Cost Reasonableness Check

**Filter 5**
Pre-Award & Clarification

**Project Execution**
Risk Reporting & Close Out Rating

---

**Evaluation Criteria**
- Price / Cost / Fee
- Project Capability
- Risk Assessment
- Value Added
- Past Performance Information (PPI)

**Short List**
prior to Interviews (if necessary)

**Total Evaluation Scores**
are determined

**Logic check**
to confirm Selection of the potential Best Value Proponent

**Pre Award Activities**
- Training
- Kickoff Meeting
- Plan & Clarify
- Summary Meeting

**Project Execution**
- Weekly Risk Report
- Director Report
- Performance Meas.
- Close Out Ratings
What are we trying to accomplish?

**Question:**

*If Purchasing wants to buy a “green circle”, in which scenario is hiring the right “green circle” easiest to justify?*
APPENDIX “E” TO PROPOSAL FORM
VALUE ADDED OPTIONS

This template must be used. Modifications to the format of this template may result in disqualification (i.e., altering font size, altering font type, adding colours, adding pictures, etc.). Do not list any names/information that can be used to identify your firm. You may add additional rows but do not exceed the 2-page limit. (You may delete these instructions.)

The Proponent is to identify any value added options, ideas, or services that are beyond the standard requirements in the tender. An explanation of “Why it is a Value Add” must be provided for each item. The corresponding cost impact of each value added option must be included. (You may delete these instructions.)

Item 1:
Why is it a Value Add?
Cost Impact ($):

Item 2:
Why is it a Value Add?
Cost Impact ($):

Item 3:
Why is it a Value Add?
Cost Impact ($):

Item 4:
Why is it a Value Add?
Cost Impact ($):

Item 5:
Why is it a Value Add?
Cost Impact ($):

Item 6:
Why is it a Value Add?
Cost Impact ($):
Submittal Requirements

- In order to minimize any bias, the Submittals must **NOT** contain any names that can be used to identify who the proponent is (such as proponent name, personnel names, project names, etc).

- Template are provided and must be used. Proponents are **NOT** allowed to re-create, re-format, or modify the templates.

- The plans should not contain marketing material.

- Each Submittal must **NOT** exceed **2 pages**.

- **Recommended Evaluation Procedures**
  - Blind
  - Independent
  - Comparative
Example of Solutions

Risk: Noise from Demolition
Type: Project Capability

• **Plan 1**
  – We will work with the user to minimize the impact of noise from demolition.

• **Plan 2**
  – We have planned to demolition during off hours and weekends. This will have a slight impact on our cost (less than 1%), but the impact to customer satisfaction justifies this.
  – We will also install rubber sheets on the floors to diminish noise and vibrations.
  – Both solutions can be performed within your budget.
  – Both solutions have been used on multiple previous projects w/ high levels of customer satisfaction (9.4/10).
Example of Solutions

Risk: Loss of Radio Flagship in Major Market
Type: Risk Assessment

• Plan 1
  – We will work very hard to maintain excellent affiliate relationships. If we lose a radio station (e.g. it changes its format) we will move quickly to replace the lost station. If we cannot quickly replace a flagship station, we can be very creative and could even consider purchasing all local inventory from a new flagship station.

• Plan 2
  – In the past 10 yrs, on over 50 accounts, 7 radio stations format changes have occurred. The following solution is optimal.
  – We own and will maintain two radio contracts covering the area, where signals can be switched if required. The flagship station will be the station with the stronger signal and greater coverage.
  – If a station is lost we will have a equal replacement within 2 months. If within two months a replacement is not contracted we will purchase inventory from another station or discount the cost of an inventory purchase and add it to our payments to the client.
Example of Solutions

Risk: Getting water to the site
Type: Risk Assessment

- **Plan 1**
  - Coordination with [water company] is critical. We will coordinate and plan with [water company] as soon as the award is made to make sure that we get water to the site to irrigate the fields.

- **Plan 2**
  - We will coordinate and schedule the water with [water company]. However, based on past experience there is a high risk they will not meet the schedule (the water company does not meet schedule over 90% of the time).
  - We will have temporary waterlines setup and ready to connect to the nearby fire hydrant to irrigate until [water company] is ready.
  - We will also have water trucks on-site if there is problems with connecting the lines.
Risk Assessment Example

- **RISK:** Major risk items typically associated with transit implementations revolve around change management and business process impact. New technology implementations create change for the users. Change often causes issues with technology adoption. Requirements and scope creep also creates challenges. Systems may have thought a certain technology or component was incorporated in the RFP and/or needs assessment process that is not included in the actual scope of work or contract. Communication is also an area that can be a challenge.

- **SOLUTION:** A clearly defined scope of work and communication of the scope at the beginning of the project minimizes scope creep. If there is a discrepancy, scope or requirements can be discussed early on in the process versus at the end of the process. Communication is the key to successful implementations. Change management and business process re-engineering for organizations can be minimized at the technology and management levels. Management can get early buy-in at the “grass roots” level and include them in the technology planning process. The Team focuses on providing very configurable and flexible tools to minimize process re-engineering tasks. The Team focuses on automating existing business processes and providing additional tools to improve those processes that need to be improved such as data management....
Things to Avoid

• **Marketing data:**
  – Our company is known worldwide as a leader in...
  – We will use our 20 years of expertise to...
  – We will use a state-of-the-art process to...
  – Non-project specific risk solutions

• **Technical data:**
  – The system we propose has 200% elongation and 600psi tensile strength.
  – The product will pass the ASTM-568a test.
  – The system can process up to 24GB per second

• **Transferring risk back to client:**
  – We will work with the owner to resolve issues...
  – We will work with the user to establish the proper tests/procedures to ensure that data is transferred properly...
  – We will have team meetings / partnering meetings with the owner...
Example: Value Added Items

- Reroofing this building will not stop all water leaks. The majority of the leaks are caused by cracks in the parapet walls, broken/missing glass, and poor caulking. For an additional $10K and 3 weeks in schedule we can replace and repair all of these items.
Value-Based Project Delivery

Filter 1
Proposal Evaluations

Filter 2
Interview Key Personnel

Filter 3
Prioritization (Identify Best Value)

Filter 4
Cost Reasonableness Check

Filter 5
Pre-Award & Clarification

Project Execution
Risk Reporting & Close Out Rating

1. Short List prior to Interviews (if necessary)
2. Total Evaluation Scores are determined
3. Logic check to confirm Selection of the potential Best Value Proponent
4. Pre-Award Activities:
   - Training
   - Kickoff Meeting
   - Plan & Clarify
   - Summary Meeting
5. Project Execution:
   - Weekly Risk Report
   - Director Report
   - Performance Meas.
   - Close Out Ratings

Evaluation Criteria:
- Price / Cost / Fee
- Project Capability
- Risk Assessment
- Value Added
- Past Performance Information (PPI)
# PPI Survey Form

**Performance Questionnaire - Design Build Project**

To:  
(Name of person completing survey)

Phone:  
Fax:  

Subject: Past Performance Survey of:  

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The University of Alberta (the University) is their key personnel. The information will be shared with the supplier/individual listed above and 1 represents a high rating for the particular area, leave it blank.

Rate each of the criteria on a scale of 1 to 10: 1 represents the best possible score and 0 represents the worst possible score.

Client Name:  
Project Name:  

<table>
<thead>
<tr>
<th>NO</th>
<th>CRITERIA</th>
<th>UNIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ability to manage costs</td>
<td>(1-10)</td>
</tr>
<tr>
<td>2</td>
<td>Ability to provide and maintain project management and construction schedule</td>
<td>(1-10)</td>
</tr>
<tr>
<td>3</td>
<td>Quality of work</td>
<td>(1-10)</td>
</tr>
<tr>
<td>4</td>
<td>Professionalism and ability to manage</td>
<td>(1-10)</td>
</tr>
<tr>
<td>5</td>
<td>Ability to minimize and respond to user complaints</td>
<td>(1-10)</td>
</tr>
<tr>
<td>6</td>
<td>Communication, explanation of risk, and documentation</td>
<td>(1-10)</td>
</tr>
<tr>
<td>7</td>
<td>Ability to work through regulatory compliance process for validation</td>
<td>(1-10)</td>
</tr>
<tr>
<td>8</td>
<td>Overall customer satisfaction and hiring again based on performance (comfort level in hiring firm again)</td>
<td>(1-10)</td>
</tr>
</tbody>
</table>

*Printed Name of Evaluator*  
*Signature of Evaluator*

Thank you for your time and effort in assisting us in this important endeavor.

Please fax the completed survey to: [Insert fax number]

---

**ASU | Performance Based Studies Research Group | www.pbsrg.com**
Value-Based Project Delivery

**Filter 1**
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**Filter 5**
Pre-Award & Clarification

**Project Execution**
Risk Reporting & Close Out Rating

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**Evaluation Criteria**
- Price / Cost / Fee
- Project Capability
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- Value Added
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**Short List prior to Interviews**
(if necessary)

**Total Evaluation Scores are determined**

Logic check to confirm Selection of the potential Best Value Proponent

**Pre Award Activities**
- Training
- Kickoff Meeting
- Plan & Clarify
- Summary Meeting

**Project Execution**
- Weekly Risk Report
- Director Report
- Performance Meas.
- Close Out Ratings

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**Contract Award**
Interview Format

• Q&A, NOT a presentation

• All individuals are interviewed separately

• Standard set of questions will be asked to each individual – specific to their project role.

• Typically 15-20 minutes per individual
Interview Questions: Identifying Expertise

1. Why were you selected for this project?

2. How many similar projects have you worked on? Please briefly describe one.

3. Draw out the process for this project by major milestone activities.
   - Identify, prioritize, and how you will minimize the risks of this project.
   - What risks don’t you control? How will you minimize those risks?
   - What do you need from the client and when do you need it?
Goal: Minimize Risk

“I have no idea why I am here today”

“My boss called me last night and told me to show up for this interview”

“I did not participate at all in preparing our proposal”

“I am not currently employed by this company, but if we win this project, they will then hire me”

“I have never managed a project of this size/scope”

“There is no risk on this project”
# Value-Based Project Delivery

## Selection

<table>
<thead>
<tr>
<th>Filter 1</th>
<th>Filter 2</th>
<th>Filter 3</th>
<th>Filter 4</th>
<th>Filter 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal</td>
<td>Interview</td>
<td>Prioritization</td>
<td>Cost</td>
<td>Pre-Award &amp; Clarification</td>
</tr>
<tr>
<td>Evaluations</td>
<td>Key Personnel</td>
<td>(Identify Best Value)</td>
<td>Reasonableness</td>
<td>Clarity</td>
</tr>
</tbody>
</table>

### Evaluation Criteria

- Price / Cost / Fee
- Project Capability
- Risk Assessment
- Value Added
- Past Performance Information (PPI)

### Short List

- Prior to Interviews (if necessary)

### Total Evaluation Scores are determined

### Logic check to confirm Selection of the potential Best Value Proponent

### Project Execution

- Risk Reporting & Close Out Rating

## Pre Planning

### Pre Award Activities

- Training
- Kickoff Meeting
- Planning & Clarifying
- Summary Meeting

### Project Execution

- Weekly Risk Report
- Director Report
- Performance Meas.
- Close Out Ratings
Value-Based Project Delivery

1. Differentiate Expertise: within a value proposition

2. Pre-Planning Before Award: focused on operational risk
Clarification / Preplanning Period

1. Pre Award Education
2. Kickoff Meeting
3. Plan & Coordinate Deliverables
4. Insert Deliverables Into Contract
5. Summary Meeting
6. Contract Signed
Kickoff Meeting

• Agenda: Supplier runs the meeting
  – Review plan in detail
  – Project Milestone Schedule
  – Address client concerns (if given)
  – Address supplier risks and unknowns
    (it is ok not to know things in BV, just need to know when you will know them and what could happen along the way)
  – Have day-by-day schedule for clarification period
  – Client Action Items
Importance of Pre-Award

Bad news is really good news if found out during the Pre-Award

• Actual Building dimensions
  • Field review revealed significant square footage difference from bridging documents
  • DB proposed floor layouts to incorporate additional space & minimize cost impact

• Cyclotron Vault Design
  • Wall thickness, foundations, piling, shielding
  • DB proposal minimized schedule impact

• Existing structure concerns
  • Field review revealed cracking on perimeter concrete beams
  • DB proposed to address structural issues during roof deck replacement
Pre Award Final Summary Meeting

• Is not a “Q&A” meeting
  – All issues resolved
  – All coordination complete
  – All risks that are not in vendors control have been identified
  – All value added options have been addressed

• PA Final Meeting is to summarize all of the coordination that has been complete and walk through the PA Document/RMP

• Upon successful completion of the PA Final Meeting, the client will make the award
## Impact of Clarification/Pre-Award

(General Services Administration)

<table>
<thead>
<tr>
<th>No</th>
<th>CRITERIA</th>
<th>Traditional RFP</th>
<th>ASU-BV</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Number of projects analyzed</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>2</td>
<td>Total awarded cost</td>
<td>$14,244,385</td>
<td>$9,994,887</td>
</tr>
<tr>
<td>3</td>
<td>Total awarded schedule</td>
<td>1,822</td>
<td>1,373</td>
</tr>
<tr>
<td>4</td>
<td>Percent awarded cost below budget</td>
<td>4.4%</td>
<td>6.0%</td>
</tr>
<tr>
<td>5</td>
<td>Average time RFP Release to Contract</td>
<td>68 days</td>
<td>78 days</td>
</tr>
<tr>
<td>6</td>
<td>Average BV-PA duration (days)</td>
<td>0</td>
<td>7</td>
</tr>
<tr>
<td>7</td>
<td>Average Overall Change Order Rate</td>
<td></td>
<td>50% Decrease</td>
</tr>
<tr>
<td>8</td>
<td>Average Overall Project Delay Rate</td>
<td></td>
<td>38% Decrease</td>
</tr>
<tr>
<td>9</td>
<td>GSA Satisfaction Rating of Contractor/Job</td>
<td></td>
<td>34% Increase</td>
</tr>
</tbody>
</table>

For within BV projects, also tested “<1 week” PA vs “>1 week” PA

- Longer PA had **33%** lower change order rate (**73% reduced overall**)
- Longer PA had **69%** lower delay rate (**73% reduced overall**)
Value-Based Project Delivery

**Filter 1**
Proposal Evaluations

**Filter 2**
Interview Key Personnel

**Filter 3**
Prioritization (Identify Best Value)

1. Price / Cost / Fee
2. Project Capability
3. Risk Assessment
4. Value Added
5. Past Performance Information (PPI)

**Filter 4**
Cost Reasonableness Check

1. Logic check to confirm Selection of the potential Best Value Proponent

**Filter 5**
Pre-Award & Clarification

1. Training
2. Kickoff Meeting
3. Planning & Clarifying
4. Summary Meeting

**Project Execution**
Risk Reporting & Close Out Rating

**Pre Award Activities**
- Weekly Risk Report
- Director Report
- Performance Meas.
- Close Out Ratings

**Contract Award**
Project Management

Common Service Delivery Challenge - **Sustaining Performance**

- **Weekly Risk Report**
  - Tool for documenting risk that impacts the project
  - Measurement in terms of cost, schedule, and client expectation

- **Performance evaluation**
  - Client closeout evaluation of vendor performance
  - Updates Past Performance Information
Definition of a risk

• A risk is anything that impacts money, time, or the expectation
What is the Weekly Risk Report?

• The Weekly Risk Report, or WRR, is a project measurement tool that:
  – Contains a summary of the original project plan with known potential risks (RMP)
  – Tracks all project deviations (risk) from the original contract plan
  – Tracks the resolution & responsibility of each risk

• WRR is filled out by Vendor, weekly
  – Even if there are no risks to report, it is still submitted

• The WRR is not a action items list, meeting minutes tracker, or a “whoopsies report”
Purpose of the WRR

• **Purposes**
  – Identifies performance of a project
  – Identifies and summarizes all project risks
  – Identifies why risk, cost impact, and/or delays occurred
  – Identifies who caused the risks
  – Complete documentation of risk & resolutions

• **Client Benefits**
  – Weekly analysis of project(s)
  – Dominant information for each project’s status
  – Easy analysis for areas of improvement
  – Helps drive accountability
  – Used to measure performance of entire organization

• **Vendor Benefits**
  – Allows vendor to document all impacts to cost/schedule
  – Allows vendor to document unresolved issues (client included)
  – Allows vendor to document all client decisions/changes/directives
  – Helps drive accountability
Weekly Risk Report

- Excel Spreadsheet that tracks risks and impacts to service
- Client will setup and send to vendor once Award/NTP issued
- The final project rating will be impacted by the accuracy and timely submittal of the WRR
Measurement of Deviation from the Expectation Management by Risk Minimization

PROJECT PLAN
- Risk
- Risk Minimization
- Schedule

WEEKLY REPORT
- Risk
- Unforeseen Risks

SERVICE METRICS (KPI)
- Time linked
- Financial
- Operational/Client Satisfac.
- Environmental

PERFORMANCE SUMMARY
- Vendor Performance
- Client Performance
- Individual Performance
- Project Performance
<table>
<thead>
<tr>
<th>NO</th>
<th>DATE ENTERED</th>
<th>RISK CATEGORY</th>
<th>RISK DETAILS</th>
<th>PLANNED RESOLUTION DATE</th>
<th>OPERATIONAL ROLLOUT</th>
<th>ACTUAL DATE RESOLVED</th>
<th>IMPACT TO SCHEDULE</th>
<th>IMPACT TO COST</th>
<th>OWNER RISK SATISFACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>2-Nov-10</td>
<td>Please identify a category from the dropdown list:</td>
<td>Please describe the details of the risk: 1. What is the risk / why was it unexpected? 2. What will be done / what is your plan to minimize this risk? 3. Who is responsible for resolving the issue? 4. What kind of impact will this have? 5. Any updates to this risk (if applicable)</td>
<td>22-Nov-10</td>
<td>15-Oct-11</td>
<td>24-Nov-10</td>
<td>No</td>
<td>$10,000</td>
<td>5</td>
</tr>
<tr>
<td>32</td>
<td>St-Wed-13</td>
<td>1) CLIENT IMPACT - Regulations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>38</td>
<td>10-Jun-11</td>
<td>1) CLIENT IMPACT - Regulations</td>
<td>1. Steam Cleaning schedule that approaches operational hours (ending between 4-6:00 AM). 2. Bee-Clean will begin to shift the steam cleaning schedule to an earlier start and end time to address appropriate dry times. 3. Rob and Bill have adjusted schedules where appropriate to maximize dry times. 4. No cost impact. 5. Revised office service schedules are operational</td>
<td>7/15/11</td>
<td>8/1/11</td>
<td>Yes</td>
<td>$</td>
<td>-</td>
<td>10</td>
</tr>
<tr>
<td>39</td>
<td>11-Oct-13</td>
<td>1) CLIENT IMPACT - Scope Change / Decision</td>
<td>1) Reduction of services at Elorsio Farm/ buildings demolished. 2) Change implemented as of April 1, 2013. Credit has been issued to the University. By Bee-Clean. From April to October to reflect the reduction of services to half for those 7 months. November’s invoice will be for 1/2 of previous billing. 3) Carolyn Smolley is responsible for getting the credit issued. David Whalen is responsible for making the amendment to the contract up. 4) Impact to price from April 2013 to July 2014</td>
<td>11-Oct-13</td>
<td>11-Oct-13</td>
<td>11-Oct-13</td>
<td>No</td>
<td>-$18,944.68</td>
<td>10</td>
</tr>
</tbody>
</table>
## Custodial Services Weekly Report

**University of Alberta**  
**Custodial Services Weekly Report**  
**November 7, 2013**

**Project Title:** Custodial Services  
**Client:** University of Alberta  
**Location:** Edmonton, Alberta  
**Vendor:** Bee-Clean  
**Contract Year:** Year 3  

**Total Number of Risks:** 7.0  
**Overall Client PM Risk Satisfaction:**  
**Number of Unresolved Risks:** 1

### Overall Cost Impacts (Compared Against Award)

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awarded Cost (fixed annual)</td>
<td>$5,885,407.34</td>
</tr>
<tr>
<td>Contract Escalator Cost Change</td>
<td>$230,699.60</td>
</tr>
<tr>
<td>Total Cumulative Additions</td>
<td>$1,324,121.25</td>
</tr>
<tr>
<td>Total Cumulative Exceptions</td>
<td></td>
</tr>
<tr>
<td>Current Total Annual Cost</td>
<td>$7,440,228.19</td>
</tr>
<tr>
<td>Percent Change</td>
<td>26.4%</td>
</tr>
</tbody>
</table>

**Vendor Change Order Rate:** 14.3%  
**Non-Vendor Change Order Rate:** 85.7%

### Annual Cost Summary

**Year 1: Aug 1, 2011 - July 31, 2012**
- **Baseline Cost:** $5,885,407.34
- **Additions:** $861,488.75
- **Closeout Cost:** $6,746,896.09
- **Percent Change:** 14.6%

**Year 2: Aug 1, 2012 - July 31, 2013**
- **Baseline Cost:** $6,000,706.73
- **Additions (Year 1):** $994,344.12
- **Additions (Year 2):** $10,262.62
- **Closeout Cost:** $7,005,313.47
- **Percent Change:** 16.7%

**Year 3: Aug 1, 2013 - July 31, 2014**
- **Baseline Cost:** $6,116,106.94
- **Additions (Year 1):** $1,014,227.04
- **Additions (Year 2):** $71,256.50
- **Additions (Year 3):** $238,637.71
- **Closeout Cost:** $7,440,228.19
- **Percent Change:** 21.6%

### Risk Analysis - Year 2 (August 1, 2012 - July 31, 2013)

<table>
<thead>
<tr>
<th>Risk Impact Analysis</th>
<th># of Risks</th>
<th>Cost Impacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) CLIENT IMPACT - Scope Change / Decision</td>
<td>2</td>
<td>$52,005.32</td>
</tr>
<tr>
<td>1) CLIENT IMPACT - Regulations</td>
<td>2</td>
<td>$</td>
</tr>
<tr>
<td>1) CLIENT IMPACT - Additional Sites</td>
<td>2</td>
<td>$238,637.71</td>
</tr>
<tr>
<td>1) CLIENT IMPACT - Other</td>
<td>0</td>
<td>$</td>
</tr>
<tr>
<td>2) VENDOR IMPACT - General Issues</td>
<td>1</td>
<td>$</td>
</tr>
<tr>
<td>2) VENDOR IMPACT - Sub/Supplier Issues</td>
<td>0</td>
<td>$</td>
</tr>
<tr>
<td>2) VENDOR IMPACT - Customer Service</td>
<td>0</td>
<td>$</td>
</tr>
<tr>
<td>2) VENDOR IMPACT - Labor</td>
<td>0</td>
<td>$</td>
</tr>
<tr>
<td>2) VENDOR IMPACT - Capital Investment</td>
<td>0</td>
<td>$</td>
</tr>
<tr>
<td>2) VENDOR IMPACT - Other</td>
<td>0</td>
<td>$</td>
</tr>
<tr>
<td>3) UNFORESEEN CONDITIONS</td>
<td>0</td>
<td>$</td>
</tr>
<tr>
<td>Totals:</td>
<td>7</td>
<td>$290,643</td>
</tr>
</tbody>
</table>
# University of Alberta Service Level Agreement Metrics

## Priority Level Service Level Agreement Metrics

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Raw Data Score</th>
<th>Level</th>
<th>%</th>
<th>Target Rating</th>
<th>Converted Score</th>
<th>Weighing</th>
<th>Points</th>
<th>Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Immediate/Emergent Response (except for the agreed upon exceptions list)</td>
<td>All Emergency Faults and Workorders are logged within 30 minutes from the time of call and the fault is remedied as a time-critical issue.</td>
<td>100</td>
<td>Move Target: 100.00% Green</td>
<td>Warning: 85.0% - 89.9% Yellow</td>
<td>Green</td>
<td>100</td>
<td>20.00%</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Alert: &lt;5% Red</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Non-Urgent Response</td>
<td>All requests have some work within the same or next scheduled shifts and are completed on business days, with service provided before the end of the shift.</td>
<td>100</td>
<td>Move Target: 85.00% Green</td>
<td>Warning: 74.5% - 84.9% Yellow</td>
<td>Green</td>
<td>100</td>
<td>10.00%</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Alert: &lt;5% Red</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Scheduled Events and Special Events</td>
<td>Scheduled events are dispatched as prescribed, and Building and Grounds Services is notified and made aware within 24 hours of the event.</td>
<td>100</td>
<td>Move Target: 100.00% Green</td>
<td>Warning: 93.5% - 99.9% Yellow</td>
<td>Green</td>
<td>100</td>
<td>10.00%</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Alert: &lt;5% Red</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Periodic Services</td>
<td>Scheduled periodic services are completed within the time specified, as per the University of Alberta’s regularly scheduled schedule.</td>
<td>100</td>
<td>Move Target: 93.5% - 99.9% Yellow</td>
<td>Warning: 84.0% - 93.9% Yellow</td>
<td>Green</td>
<td>100</td>
<td>15.00%</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Alert: &lt;5% Red</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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</tbody>
</table>

## Non-Priority Level Service Level Agreement Metrics

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Raw Data Score</th>
<th>Level</th>
<th>%</th>
<th>Target Rating</th>
<th>Converted Score</th>
<th>Weighing</th>
<th>Points</th>
<th>Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Number of Callbacks</td>
<td>Call backs are returned, 95% of the call backs are defined by NAQI’s completed (more than 2 days above)</td>
<td>100</td>
<td>Move Target: &lt;5% Green</td>
<td>Warning: 5.1% - 7.4% Yellow</td>
<td>Green</td>
<td>100</td>
<td>5.00%</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Alert: &gt;7% Red</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Results of Quality Assurance Inspections performed by Bee-Clean</td>
<td>Total percentage of inspections that meet or exceed Faculty OPM.</td>
<td>100</td>
<td>Move Target: 95.00% Green</td>
<td>Warning: 94.0% - 94.9% Yellow</td>
<td>Green</td>
<td>100</td>
<td>26.00%</td>
<td>26</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Alert: &lt;90% Red</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Results of Quality Assurance Inspections performed by the University of Alberta</td>
<td>Total percentage of inspections that meet or exceed Faculty OPM.</td>
<td>91</td>
<td>Move Target: 95.00% Green</td>
<td>Warning: 94.0% - 94.9% Yellow</td>
<td>Green</td>
<td>100</td>
<td>15.00%</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Alert: &lt;90% Red</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Directors Report Analysis

- Directors Report can provide analysis and performance of:
  - Individual Projects
  - External Contractors
  - External Designers
  - Client Project Managers
  - Client Procurement Officers
  - Other Internal Staff (Codes/Permitting)
  - Client Directors
  - Selection Process (LB/BV)
  - Delivery Method (DBB, DB, CMAR)
  - Entire organization
Program Report

Vice President

Director 1
- PM 1
  - Contractor 1
  - Contractor 2
  - Contractor 3
  - Contractor 4

PM 2
- Contractor 3
- Contractor 6
- Contractor 1
- Contractor 8

Director 2
- PM 3
  - Contractor 9
  - Contractor 7
  - Contractor 7
  - Contractor 2

PM 4
- Contractor 4
- Contractor 8
- Contractor 9
- Contractor 2
## General Overview

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Number of Projects (Completed and In-Progress)</td>
<td>161</td>
</tr>
<tr>
<td>Awarded Proposal Cost</td>
<td>$49,178,524</td>
</tr>
<tr>
<td>Approved Value Added Options</td>
<td>$4,041,940</td>
</tr>
<tr>
<td>Total Awarded Cost</td>
<td>$50,603,783</td>
</tr>
<tr>
<td>Average Proposal Cost</td>
<td>$55,247,798</td>
</tr>
<tr>
<td>Percent Awarded Below Average Cost</td>
<td>11%</td>
</tr>
<tr>
<td>Percent of Projects where BV had lowest cost</td>
<td>53%</td>
</tr>
<tr>
<td>Percent of Projects where BV was TGB Vendor</td>
<td>16%</td>
</tr>
</tbody>
</table>

## Cost Increases

<table>
<thead>
<tr>
<th>Description</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Change Order Rate</td>
<td>7.0%</td>
</tr>
<tr>
<td>Client Change Order Rate</td>
<td>4.9%</td>
</tr>
<tr>
<td>Internal Partners Change Order Rate</td>
<td>1.4%</td>
</tr>
<tr>
<td>Designer Change Order Rate</td>
<td>0.7%</td>
</tr>
<tr>
<td>Contractor Change Order Rate</td>
<td>0.1%</td>
</tr>
</tbody>
</table>

## Schedule Increases

<table>
<thead>
<tr>
<th>Description</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Delay Rate</td>
<td>45.1%</td>
</tr>
<tr>
<td>Client Delay Rate</td>
<td>23.8%</td>
</tr>
<tr>
<td>Internal Partners Delay Rate</td>
<td>12.9%</td>
</tr>
<tr>
<td>Designer Delay Rate</td>
<td>4.2%</td>
</tr>
<tr>
<td>Contractor Delay Rate</td>
<td>4.1%</td>
</tr>
</tbody>
</table>

## Satisfaction Ratings

<table>
<thead>
<tr>
<th>Rating</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPPM Post Project Evaluation of Vendor</td>
<td>9.6</td>
</tr>
</tbody>
</table>
### Report - Directors

<table>
<thead>
<tr>
<th>Number of Projects</th>
<th>Director 1</th>
<th>Director 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Total Number of Projects (Completed &amp; In Progress)</td>
<td>40</td>
<td>121</td>
</tr>
<tr>
<td>2 Total Number of In Progress Projects</td>
<td>8</td>
<td>24</td>
</tr>
<tr>
<td>3 Total Number of Completed Projects</td>
<td>31</td>
<td>95</td>
</tr>
<tr>
<td>4 Total Number of Projects on Hold</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>5 Weekly Reports Submitted On Time</td>
<td>78%</td>
<td>97%</td>
</tr>
</tbody>
</table>

### Cost Analysis

<table>
<thead>
<tr>
<th></th>
<th>Director 1</th>
<th>Director 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 Total Awarded Cost:</td>
<td>$14,669,944</td>
<td>$35,933,839</td>
</tr>
<tr>
<td>7 Overall Change Order Rate</td>
<td>5.7%</td>
<td>7.5%</td>
</tr>
<tr>
<td>8 Client Change Order Rate</td>
<td>4.2%</td>
<td>5.1%</td>
</tr>
<tr>
<td>9 Internal Partners Change Order Rate</td>
<td>0.8%</td>
<td>1.6%</td>
</tr>
<tr>
<td>10 Designer Change Order Rate</td>
<td>0.6%</td>
<td>0.7%</td>
</tr>
<tr>
<td>11 Contractor Change Order Rate</td>
<td>0.1%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

### Schedule Analysis

<table>
<thead>
<tr>
<th></th>
<th>Director 1</th>
<th>Director 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 Overall Delay Rate</td>
<td>48.0%</td>
<td>44.2%</td>
</tr>
<tr>
<td>13 Client Delay Rate</td>
<td>21.6%</td>
<td>24.5%</td>
</tr>
<tr>
<td>14 Internal Partners Delay Rate</td>
<td>19.6%</td>
<td>10.8%</td>
</tr>
<tr>
<td>15 Designer Delay Rate</td>
<td>2.7%</td>
<td>4.7%</td>
</tr>
<tr>
<td>16 Contractor Delay Rate</td>
<td>4.0%</td>
<td>4.1%</td>
</tr>
</tbody>
</table>
### General Overview

<table>
<thead>
<tr>
<th></th>
<th>TEAM 1 (President / University / Admin)</th>
<th>TEAM 2 Academic Health Center</th>
<th>TEAM 3 Provost College</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total Number of Projects</td>
<td>19</td>
<td>14</td>
</tr>
<tr>
<td>2</td>
<td>Percent of Projects Procured Using PIPS</td>
<td>79%</td>
<td>86%</td>
</tr>
<tr>
<td>3</td>
<td>Total Awarded Cost:</td>
<td>$5,359,995</td>
<td>$2,821,005</td>
</tr>
<tr>
<td>4</td>
<td>Average Number of Risks per Project</td>
<td>3</td>
<td>8</td>
</tr>
</tbody>
</table>

### Owner Impacts

<table>
<thead>
<tr>
<th></th>
<th>TEAM 1</th>
<th>TEAM 2</th>
<th>TEAM 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Overall Owner Impacts (Time &amp; Cost)</td>
<td>7.7%</td>
<td>41.3%</td>
</tr>
<tr>
<td>6</td>
<td>Owner Change Order Rate</td>
<td>0.6%</td>
<td>3.4%</td>
</tr>
<tr>
<td>7</td>
<td>Owner Delay Rate</td>
<td>7.2%</td>
<td>37.8%</td>
</tr>
<tr>
<td>8</td>
<td>Percent of Projects without Owner Cost Changes</td>
<td>63%</td>
<td>36%</td>
</tr>
<tr>
<td>9</td>
<td>Percent of Projects without Owner Delays</td>
<td>68%</td>
<td>50%</td>
</tr>
</tbody>
</table>

### Contractor Impacts

<table>
<thead>
<tr>
<th></th>
<th>TEAM 1</th>
<th>TEAM 2</th>
<th>TEAM 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Overall Contractor Impacts (Time &amp; Cost)</td>
<td>8.1%</td>
<td>19.6%</td>
</tr>
<tr>
<td>11</td>
<td>Contractor Change Order Rate</td>
<td>0.1%</td>
<td>0.1%</td>
</tr>
<tr>
<td>12</td>
<td>Contractor Delay Rate</td>
<td>8.0%</td>
<td>19.6%</td>
</tr>
<tr>
<td>13</td>
<td>Percent of Projects without Contractor Cost Changes</td>
<td>95%</td>
<td>93%</td>
</tr>
<tr>
<td>14</td>
<td>Percent of Projects without Contractor Delays</td>
<td>79%</td>
<td>79%</td>
</tr>
</tbody>
</table>

### Satisfaction Ratings

<table>
<thead>
<tr>
<th></th>
<th>TEAM 1</th>
<th>TEAM 2</th>
<th>TEAM 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>Total Number of Completed Projects</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>16</td>
<td>Total Number of Client Surveys Returned</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>17</td>
<td>Percent of Projects Evaluated by Client</td>
<td>75%</td>
<td>100%</td>
</tr>
<tr>
<td>18</td>
<td>Average PM Post Project Rating of Contractor</td>
<td>6.75</td>
<td>10</td>
</tr>
<tr>
<td>19</td>
<td>Average Client Post Project Rating of Contractor</td>
<td>7.7</td>
<td>8.5</td>
</tr>
<tr>
<td>20</td>
<td>Average Client Post Project Rating of CPPM</td>
<td>10.7</td>
<td>8.5</td>
</tr>
</tbody>
</table>
# Report – Internal PM’s

## General Overview

<table>
<thead>
<tr>
<th>Metric</th>
<th>Average</th>
<th>PM 1</th>
<th>PM 2</th>
<th>PM 3</th>
<th>PM 4</th>
<th>PM 5</th>
<th>PM 6</th>
<th>PM 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Number of Projects (Completed, On Hold &amp; In Progress)</td>
<td>12</td>
<td>4</td>
<td>1</td>
<td>19</td>
<td>53</td>
<td>24</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Total Number of In Progress Projects</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>7</td>
<td>4</td>
<td>4</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total Number of Projects on Hold</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Total Awarded Cost:</td>
<td>$3.9 M</td>
<td>$1.2 M</td>
<td>$0.0 M</td>
<td>$11.5 M</td>
<td>$15.0 M</td>
<td>$3.1 M</td>
<td>$1.6 M</td>
<td>$0.3 M</td>
</tr>
<tr>
<td>Weekly Reports Submitted On Time</td>
<td>42.6%</td>
<td>77.8%</td>
<td>89.7%</td>
<td>55.2%</td>
<td>59.4%</td>
<td>100.0%</td>
<td>0.0%</td>
<td>33.3%</td>
</tr>
</tbody>
</table>

## Cost Analysis

<table>
<thead>
<tr>
<th>Metric</th>
<th>Average</th>
<th>PM 1</th>
<th>PM 2</th>
<th>PM 3</th>
<th>PM 4</th>
<th>PM 5</th>
<th>PM 6</th>
<th>PM 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Change Order Rate</td>
<td>6.6%</td>
<td>1.7%</td>
<td>0.0%</td>
<td>9.1%</td>
<td>3.5%</td>
<td>4.6%</td>
<td>28.4%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Client Change Order Rate</td>
<td>4.4%</td>
<td>0.2%</td>
<td>0.0%</td>
<td>5.0%</td>
<td>2.0%</td>
<td>3.9%</td>
<td>20.1%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Unforeseen Change Order Rate</td>
<td>0.8%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>1.9%</td>
<td>0.4%</td>
<td>0.2%</td>
<td>4.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Internal Partners Change Order Rate</td>
<td>0.7%</td>
<td>0.9%</td>
<td>0.0%</td>
<td>1.9%</td>
<td>0.3%</td>
<td>0.2%</td>
<td>0.8%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Designer Change Order Rate</td>
<td>0.7%</td>
<td>0.6%</td>
<td>0.0%</td>
<td>0.3%</td>
<td>0.8%</td>
<td>0.3%</td>
<td>3.5%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Contractor Change Order Rate</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.1%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

## Schedule Analysis

<table>
<thead>
<tr>
<th>Metric</th>
<th>Average</th>
<th>PM 1</th>
<th>PM 2</th>
<th>PM 3</th>
<th>PM 4</th>
<th>PM 5</th>
<th>PM 6</th>
<th>PM 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Delay Rate</td>
<td>22.5%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>46.8%</td>
<td>26.2%</td>
<td>15.9%</td>
<td>35.4%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Client Change Order Rate</td>
<td>10.8%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>25.1%</td>
<td>11.9%</td>
<td>4.0%</td>
<td>35.4%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Unforeseen Change Order Rate</td>
<td>1.1%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>1.5%</td>
<td>0.7%</td>
<td>0.9%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Internal Partners Delay Rate</td>
<td>6.4%</td>
<td>0.0%</td>
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</tr>
<tr>
<td>Designer Change Order Rate</td>
<td>1.9%</td>
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<td>2.9%</td>
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<tr>
<td>Contractor Change Order Rate</td>
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<td>3.7%</td>
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<td>0.0%</td>
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</tr>
<tr>
<td>No</td>
<td>Contractor</td>
<td>Total Number of Projects</td>
<td>Total Awarded Cost:</td>
<td>Owner Change Order Rate</td>
<td>Owner Delay Rate</td>
<td>Vendor Change Order Rate</td>
<td>Vendor Delay Rate</td>
<td>Percent of Late Reports</td>
</tr>
<tr>
<td>----</td>
<td>------------------</td>
<td>--------------------------</td>
<td>---------------------</td>
<td>-------------------------</td>
<td>------------------</td>
<td>-------------------------</td>
<td>------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>1</td>
<td>Contractor 118</td>
<td>3</td>
<td>$ 721,965</td>
<td>0.3%</td>
<td>18.1%</td>
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<td>66.8%</td>
<td>53%</td>
</tr>
<tr>
<td>2</td>
<td>Contractor 119</td>
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<td>$ 220,002</td>
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<td>3</td>
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<td>$ 269,850</td>
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<tr>
<td>4</td>
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<td>0.0%</td>
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<tr>
<td>5</td>
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<td>0%</td>
</tr>
<tr>
<td>6</td>
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<td>16.3%</td>
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</tr>
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<td>7</td>
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<td>$ 1,280,362</td>
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<tr>
<td>9</td>
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<td>0.6%</td>
<td>11.4%</td>
<td>25%</td>
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<td>10</td>
<td>Contractor 123</td>
<td>2</td>
<td>$ 3,227,182</td>
<td>14.9%</td>
<td>0.0%</td>
<td>-0.6%</td>
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</tr>
<tr>
<td>11</td>
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<td>$ 327,295</td>
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<td>135.4%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>32%</td>
</tr>
<tr>
<td>12</td>
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<td>$ 69,218</td>
<td>3.5%</td>
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<td>0.0%</td>
<td>0.0%</td>
<td>31%</td>
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<tr>
<td>13</td>
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<td>$ 1,150,738</td>
<td>1.9%</td>
<td>7.3%</td>
<td>0.0%</td>
<td>4.2%</td>
<td>26%</td>
</tr>
<tr>
<td>14</td>
<td>Contractor 109</td>
<td>5</td>
<td>$ 534,095</td>
<td>2.0%</td>
<td>23.2%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>29%</td>
</tr>
<tr>
<td>15</td>
<td>Contractor 126</td>
<td>1</td>
<td>$ 323,000</td>
<td>3.3%</td>
<td>3.4%</td>
<td>0.0%</td>
<td>6.8%</td>
<td>22%</td>
</tr>
<tr>
<td>16</td>
<td>Contractor 110</td>
<td>1</td>
<td>$ 308,882</td>
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<td>24.8%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>27%</td>
</tr>
<tr>
<td>17</td>
<td>Contractor 127</td>
<td>7</td>
<td>$ 1,793,355</td>
<td>3.8%</td>
<td>13.6%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>26%</td>
</tr>
<tr>
<td>18</td>
<td>Contractor 128</td>
<td>4</td>
<td>$ 2,956,800</td>
<td>1.3%</td>
<td>1.7%</td>
<td>0.0%</td>
<td>12.2%</td>
<td>11%</td>
</tr>
<tr>
<td>19</td>
<td>Contractor 129</td>
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<td>$ 1,319,789</td>
<td>2.2%</td>
<td>16.2%</td>
<td>0.0%</td>
<td>11.0%</td>
<td>9%</td>
</tr>
<tr>
<td>20</td>
<td>Contractor 111</td>
<td>4</td>
<td>$ 1,096,707</td>
<td>0.1%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>9.8%</td>
<td>10%</td>
</tr>
<tr>
<td>21</td>
<td>Contractor 112</td>
<td>1</td>
<td>$ 446,100</td>
<td>0.0%</td>
<td>6.9%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>15%</td>
</tr>
<tr>
<td>22</td>
<td>Contractor 113</td>
<td>3</td>
<td>$ 552,815</td>
<td>5.1%</td>
<td>29.4%</td>
<td>0.0%</td>
<td>7.0%</td>
<td>8%</td>
</tr>
<tr>
<td>23</td>
<td>Contractor 114</td>
<td>2</td>
<td>$ 1,841,157</td>
<td>13.0%</td>
<td>215.8%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>13%</td>
</tr>
</tbody>
</table>
# Yearly Analysis

## UMN Year to Year PIPS Performance

<table>
<thead>
<tr>
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<th></th>
<th></th>
<th></th>
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<tbody>
<tr>
<td>1</td>
<td>Number of Best-Value Procurements</td>
<td>161</td>
<td>8</td>
<td>26</td>
<td>37</td>
<td>58</td>
<td>31</td>
</tr>
<tr>
<td>2</td>
<td>Completed Projects</td>
<td>126</td>
<td>8</td>
<td>26</td>
<td>37</td>
<td>47</td>
<td>8</td>
</tr>
<tr>
<td>3</td>
<td>Average Proposal Cost (Million)</td>
<td>$55,247,797.5</td>
<td>$3,559,703</td>
<td>$7,157,304</td>
<td>$7,800,951</td>
<td>$21,406,067</td>
<td>$15,198,841</td>
</tr>
<tr>
<td>4</td>
<td>Awarded Cost (Million)</td>
<td>$49,178,524.0</td>
<td>$3,077,177</td>
<td>$6,803,515</td>
<td>$7,379,659</td>
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<td>$12,784,389</td>
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<tr>
<td>5</td>
<td>Percent Awarded Below Average Cost</td>
<td>11.0%</td>
<td>13.6%</td>
<td>4.9%</td>
<td>5.4%</td>
<td>11.2%</td>
<td>15.9%</td>
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<tr>
<td>6</td>
<td>Average Number of Proposals</td>
<td>4.0</td>
<td>3.6</td>
<td>3.3</td>
<td>3.1</td>
<td>4.4</td>
<td>4.7</td>
</tr>
<tr>
<td>7</td>
<td>Percentage of Jobs Awarded to TGB Vendors</td>
<td>45%</td>
<td>50.0%</td>
<td>46.1%</td>
<td>54.1%</td>
<td>58.6%</td>
<td>51.5%</td>
</tr>
<tr>
<td>8</td>
<td>Projects Where Best-Value was also Lowest Cost</td>
<td>55%</td>
<td>50.0%</td>
<td>46.1%</td>
<td>54.1%</td>
<td>58.6%</td>
<td>51.5%</td>
</tr>
<tr>
<td>9</td>
<td>% Projects on Budget</td>
<td>45%</td>
<td>50.0%</td>
<td>46.1%</td>
<td>54.1%</td>
<td>58.6%</td>
<td>51.5%</td>
</tr>
<tr>
<td>10</td>
<td>Overall Cost Increases</td>
<td>7.0%</td>
<td>8.2%</td>
<td>2.2%</td>
<td>8.5%</td>
<td>12.6%</td>
<td>15.5%</td>
</tr>
<tr>
<td>11</td>
<td>Cost Increases (Client)</td>
<td>4.9%</td>
<td>7.4%</td>
<td>1.2%</td>
<td>7.0%</td>
<td>8.3%</td>
<td>1.1%</td>
</tr>
<tr>
<td>12</td>
<td>Cost Increases (CPIP)</td>
<td>1.4%</td>
<td>0.4%</td>
<td>0.5%</td>
<td>0.4%</td>
<td>3.3%</td>
<td>0.2%</td>
</tr>
<tr>
<td>13</td>
<td>Cost Increases (Designer)</td>
<td>0.7%</td>
<td>0.0%</td>
<td>0.5%</td>
<td>1.3%</td>
<td>0.9%</td>
<td>0.2%</td>
</tr>
<tr>
<td>14</td>
<td>Cost Increases (Contractor)</td>
<td>0.1%</td>
<td>0.4%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.1%</td>
<td>0.0%</td>
</tr>
<tr>
<td>15</td>
<td>% Projects on Time</td>
<td>45%</td>
<td>25.0%</td>
<td>42.3%</td>
<td>37.8%</td>
<td>39.7%</td>
<td>71.0%</td>
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<tr>
<td>16</td>
<td>Overall Schedule Increases</td>
<td>45.1%</td>
<td>98.5%</td>
<td>34.5%</td>
<td>69.4%</td>
<td>50.0%</td>
<td>12.9%</td>
</tr>
<tr>
<td>17</td>
<td>Schedule Increases (Client)</td>
<td>23.8%</td>
<td>74.1%</td>
<td>15.7%</td>
<td>40.8%</td>
<td>25.4%</td>
<td>3.3%</td>
</tr>
<tr>
<td>18</td>
<td>Schedule Increases (CPIP)</td>
<td>12.9%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
</tr>
<tr>
<td>19</td>
<td>Schedule Increases (Designer)</td>
<td>4.2%</td>
<td>0.0%</td>
<td>4.3%</td>
<td>8.3%</td>
<td>3.5%</td>
<td>2.5%</td>
</tr>
<tr>
<td>20</td>
<td>Schedule Increases (Contractor)</td>
<td>4.1%</td>
<td>0.9%</td>
<td>5.1%</td>
<td>5.3%</td>
<td>5.0%</td>
<td>0.7%</td>
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</table>
# Report – Top 10 Riskiest Projects

<table>
<thead>
<tr>
<th>No</th>
<th>Project</th>
<th>Awarded Cost</th>
<th>Awarded Duration</th>
<th>Overall Change Order Rate</th>
<th>Overall Delay Rate</th>
<th>Percent of Late Reports</th>
<th>Risk Analysis Factor</th>
<th>PM</th>
<th>Director</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Mayo Remodel Suite A652</td>
<td>$269,850</td>
<td>66</td>
<td>9%</td>
<td>321%</td>
<td>47%</td>
<td>377%</td>
<td>Wycliffe Waganda</td>
<td>Gary Summerville</td>
</tr>
<tr>
<td>2</td>
<td>Barn Clean Renovations</td>
<td>$269,000</td>
<td>80</td>
<td>2%</td>
<td>166%</td>
<td>60%</td>
<td>229%</td>
<td>Wycliffe Waganda</td>
<td>Justin Grussing</td>
</tr>
<tr>
<td>3</td>
<td>WBOB Remodel Suite 150</td>
<td>$273,100</td>
<td>99</td>
<td>1%</td>
<td>96%</td>
<td>37%</td>
<td>134%</td>
<td>Pete Nickel</td>
<td>Gary Summerville</td>
</tr>
<tr>
<td>4</td>
<td>Vet Sciences Third Floor</td>
<td>$96,930</td>
<td>49</td>
<td>3%</td>
<td>86%</td>
<td>28%</td>
<td>116%</td>
<td>Pete Nickel</td>
<td>Gary Summerville</td>
</tr>
<tr>
<td>5</td>
<td>Weaver Densford College of Pharmacy</td>
<td>$90,862</td>
<td>28</td>
<td>2%</td>
<td>25%</td>
<td>80%</td>
<td>107%</td>
<td>Pete Nickel</td>
<td>Gary Summerville</td>
</tr>
<tr>
<td>6</td>
<td>PWB Remodel Suite 6-240</td>
<td>$127,338</td>
<td>82</td>
<td>17%</td>
<td>23%</td>
<td>64%</td>
<td>104%</td>
<td>Steve Bailey</td>
<td>Gary Summerville</td>
</tr>
<tr>
<td>7</td>
<td>PWB Room 7-158B</td>
<td>$46,504</td>
<td>30</td>
<td>0%</td>
<td>0%</td>
<td>100%</td>
<td>100%</td>
<td>Pete Nickel</td>
<td>Gary Summerville</td>
</tr>
<tr>
<td>8</td>
<td>Oak Street Parking Surveillance</td>
<td>$246,802</td>
<td>74</td>
<td>0%</td>
<td>0%</td>
<td>100%</td>
<td>100%</td>
<td>George Mahowald</td>
<td>Justin Grussing</td>
</tr>
<tr>
<td>9</td>
<td>Snyder Bldg Exterior Door</td>
<td>$219,000</td>
<td>121</td>
<td>-4%</td>
<td>81%</td>
<td>22%</td>
<td>100%</td>
<td>Wycliffe Waganda</td>
<td>Justin Grussing</td>
</tr>
<tr>
<td>10</td>
<td>Heller Hall Renovation</td>
<td>$1,593,561</td>
<td>254</td>
<td>29%</td>
<td>0%</td>
<td>50%</td>
<td>79%</td>
<td>Matt Stringfellow</td>
<td>Justin Grussing</td>
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</table>
# Report – Analysis of Risks

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<tr>
<th>Risk Category</th>
<th>Number of Risks</th>
<th>Impact to Cost</th>
<th>Impact to Schedule</th>
<th>Percent Impact to Cost</th>
<th>Percent Impact to Schedule</th>
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<tbody>
<tr>
<td><strong>1) Client Impacts</strong></td>
<td>114</td>
<td>$660,369</td>
<td>1,200</td>
<td>59%</td>
<td>46%</td>
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<tr>
<td>Client Scope Change / Decision</td>
<td>111</td>
<td>$660,369</td>
<td>976</td>
<td>59%</td>
<td>37%</td>
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<tr>
<td>Client Requested Delay</td>
<td>3</td>
<td>-</td>
<td>224</td>
<td>0%</td>
<td>9%</td>
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<tr>
<td><strong>2) CPPM Impacts</strong></td>
<td>135</td>
<td>$329,425</td>
<td>885</td>
<td>30%</td>
<td>34%</td>
</tr>
<tr>
<td>Design Issue</td>
<td>48</td>
<td>$189,876</td>
<td>230</td>
<td>17%</td>
<td>9%</td>
</tr>
<tr>
<td>CPPM Issue (Codes / Permits)</td>
<td>36</td>
<td>$46,140</td>
<td>170</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>CPPM Issue (Energy Mgmt)</td>
<td>2</td>
<td>$47,533</td>
<td>30</td>
<td>4%</td>
<td>1%</td>
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<tr>
<td>CPPM Issue (Hazardous / Health &amp; Safety)</td>
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<td>$35,407</td>
<td>118</td>
<td>3%</td>
<td>5%</td>
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<tr>
<td>CPPM Issue (NTS)</td>
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<td>$10,018</td>
<td>64</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>CPPM Issue (Contract / Payment)</td>
<td>11</td>
<td>-</td>
<td>132</td>
<td>0%</td>
<td>5%</td>
</tr>
<tr>
<td>CPPM Issue (Other)</td>
<td>22</td>
<td>$451</td>
<td>141</td>
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<td>5%</td>
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<td><strong>3) Contractor Impacts</strong></td>
<td>43</td>
<td>$21,005</td>
<td>411</td>
<td>2%</td>
<td>16%</td>
</tr>
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<td>Contractor Issue</td>
<td>11</td>
<td>-</td>
<td>101</td>
<td>0%</td>
<td>4%</td>
</tr>
<tr>
<td>Contractor Oversight of Design</td>
<td>9</td>
<td>$21,005</td>
<td>38</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Contractor Issue with Supplier / Sub</td>
<td>23</td>
<td>-</td>
<td>272</td>
<td>0%</td>
<td>10%</td>
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<tr>
<td><strong>4) Unforeseen Impacts</strong></td>
<td>19</td>
<td>$102,544</td>
<td>111</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>311</td>
<td>$1,113,343</td>
<td>2,607</td>
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Education Opportunities

• Conferences, Seminars, on-site training

• MS Program – online or in-person

• 200+ hr Certificate Program (Spring 2014)

• Online Certification prep
  – FMP, SFP (Spring 2014)
sustainable engineering and the built environment

facility management concentration
del e. webb school of construction

overview

The Facility Management M.S. concentration is IFMA Accredited, and supports the needs of students desiring a career in the maintenance, operation, renovation, or decommissioning of existing facilities.

SPECIFICS OF THE PROGRAM INCLUDE:

- Thesis and Non-Thesis options available (chat with an advisor to discuss the best option for you)
- 30 credits (10 classes or 8 classes with a Thesis)
- Can be taken Online or in person
- Courses taught by academic and industry professionals

Beyond a cutting-edge FM education, students will also learn
requirements

- Undergraduate degree*
- No GRE or placement tests

courses*

- Operations & Maintenance
- Facilities Administration
- Building Energy Management
- Facilities Project Management
- Sustainable Facilities
- Advanced Business Processes
- Leadership Principles
- Applied project
- Numerous electives offered
- Internships available

*Can be adjusted to each student’s needs

Apply Now!

(Must apply by March 1 for fall semester and October...
Comments / Questions

For more information: please leave a business card

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