

AACE Seminar May 9, 2014

Means and Methods of Scheduling Control



**Willis Tower
Oracle Corporation - 45th Floor
233 S. Wacker Drive, Chicago, IL 60606**

AGENDA

- 8:00 AM** **Registration, Continental Breakfast & Networking**
- 8:20 AM** **Opening Remarks – Means and Methods of Scheduling Control**
Frank Infusino, Seminar Chairman, AAACE Chicago Midwest Section
- 8:30 AM** **Concurrent Delay - The Owner’s Newest Defense**
Speaker James G. Zack Jr- Navigant
- 9:30 AM** **Senior Management Review of Project CPM Schedules**
Speaker: Donald McDonald - Fluor Enterprises
- 10:30AM** **Scheduling, Best Practices and Lessons Learned (Tricks, Traps and Ploys)**
(Panel Presentation: Noel McFarlane - Sr. Controls Manager, URS Corp.,
Kristie Contreras, Scheduler II - Exelon Generation &
Don Giegerich - CCP Critical Decision-Makers Group)
- 12:00 PM** **Lunch & Networking**
- 12:45 PM** **Status of the Organization - AAACE International**
Speaker: John Ciccarella- President AAACE International
- 1:30 PM** **Evolution of Scheduling and Future Applications**
Speaker: Krista Lambert - Primavera Global Business Unit - Oracle
- 2:30 PM** **Managing the Complexity in Today’s Software to Produce Practical**
Scheduling Solutions
Robert Birdsall - EPPM Group
- 3:30 PM** **Case Study: Use of Project controls and Defining Work Flow Streams for BP12**
Pipe Still Outage Project
Dave Koester - BMW Constructors
- 4:30 PM** **Closing Remarks**
Scott Hollingsworth, President, AAACE Chicago Midwest Section

*Net Proceeds to benefit the AAACE Chicago Midwest Scholarship Fund,
providing scholarships to worthy Midwest College Students*

Concurrent Delay- The Owner's Newest Defense

Speaker: James G. Zack Jr - Navigant Consulting- Navigant Construction Forum

Presentation Abstract

When owners impose liquidated damages at the end of a delayed project, contractors often respond with allegations of concurrent delay. That is, Contractors argue that some or all of the project delay was actually caused either by the owner or an external force, concurrent with the contractor's delays, and therefore, liquidated damages should be forgiven or excused. As owners generally do not impose liquidated damages until the end of the project, frequently a contractor's claim of concurrent delay is not submitted until the project is complete. This presentation explores mechanisms, based on recent court rulings that owners employ to defeat a contractor's "concurrent delay defense".

Speaker Background

James G. Zack Jr. Executive Director, Navigant Construction Forum™ – the construction industry's global resource for thought leadership and best practices on avoidance and resolution of construction project disputes globally. Formerly Executive Director, Corporate Claims Management, Fluor Corporation; Vice President, Pinnacle One; and Senior Construction Claims Consultant, CH2M HILL, Inc. With more than 40 years experience he is a recognized expert in mitigation, analysis and resolution or defense of construction claims. A Fellow of AACE and RICS, Mr. Zack is a Certified Forensic Claims Consultant, a Certified Construction Manager and a Project Management Professional as well as a nationally known author and speaker on construction claims.

Senior Management Review of Project CPM Schedules

Speaker: Donald McDonald PE, CCP PSP - Fluor Enterprises

Presentation Abstract

CPM schedules necessarily become large, complex data stores of history, knowledge and forecasting information used to plan, monitor and control projects. As a result, that information, if not presented in a coherent and concise manner can lead to misunderstanding and poor decision making by a project's senior management team.

The goal of this presentation is to focus on the levels of detail and the minimum information needed to be communicated effectively to senior management so that they may facilitate project success. That facilitation includes identifying strategies and tactics for achieving overall goals, deploying needed resources, and when dealing with change and risk issues, making appropriate decisions as how best to proceed and resolve. In short, it is all about effectively communicating to managers who have limited time and overall knowledge while being tasked with making correct critical decisions timely.

Speaker Background

Donald McDonald is an Executive Director and leads Fluor's Corporate Claims Management Group which is responsible for assuring the prevention and resolution of disputed change and claims on Fluor's portfolio of EPC and Design-Build projects. Mr. McDonald has been a member of AACE International since 1984 and has provided training and paper presentations to a global audience of cost engineering and cost management practitioners.

Scheduling, Best Practices and Lessons Learned (Tricks, Traps and Ploys)

Speakers: Noel McFarlane, Sr. Controls Manager URS Corp.

Kristie Contreras, Scheduler II, Exelon Generation

Don Giegerich, CCP Critical Decision-Makers Group

Presentation Abstract

Presenters, with over 100 years of combined experience, will focus on key Planning and Scheduling techniques which form the basis of industry best practices. Illustrations will be provided of successful project scheduling using lessons learned from prior experience as well as methods to avoid the many tricks, traps and ploys that often lead to the misuse of scheduling tools.

Speaker Backgrounds

Noel McFarlane is a Senior Program Controls Manager for the URS Corporation. He has specialized for the last 30 years in developing and implementing project control systems for large transportation, roadway, residential housing, educational, medical, water reclamation and commercial projects during the planning, design, procurement and construction phases. Mr. McFarlane is both a Registered Professional Engineer and Certified Project Manager.

Kristie Contreras has over 25 years of Project Management, Construction Management, Program Management and Project Controls Experience in the Construction and Nuclear Power Plant Industries. She is an expert in Critical Path Method scheduling. Her scheduling experience includes schedule preparation, maintenance and analysis from both the Contracting and Owner's perspective. Additionally, she has extensive experience in resource and cost loading of schedules as well as using the schedule to analyze SPI and Earned Value Management. Her additional scheduling experience includes claims preparation and analysis as well as development of claims defenses from both a Contracting and an Owner's perspective.

Don Giegerich is an experienced construction consultant with over 40 years of experience in engineering, construction management, scheduling and claims. He is currently a principal with Critical Decision-Makers Group and was previously with several major CM and consulting firms. He is a Certified Cost Professional, Licensed Professional Engineer and is a recognized Construction Expert.

Status of the Organization-AACE International

Speaker: John Ciccarelli - President AACE International

Evolution of Scheduling and Future Applications

Speaker: Krista Lambert - Primavera Global Business Unit- Oracle

Presentation Abstract

This presentation will focus on the drive (and need) towards specialization of solution sets within engineering and construction. The presentation will focus on Oracle's Primavera products along with Oracle Primavera Partner products to illustrate significant changes in applications and capabilities for use on construction projects.

Speaker Background

Krista Lambert is the Director of Engineering and Construction Strategy for Oracle Primavera. Krista has more than 26 years of industry experience including working for Primavera for the last 16 years. She is currently leading the construction solution strategy for the Oracle Primavera Global Business Unit. As such, a large part of her time is spent meeting with industry leaders and communicating Primavera's vision of business transformation to them in order to bring more value to their business through financial and risk management, operational excellence and innovation management.

Managing the Complexity in Today's Software to Produce Practical Scheduling Solutions

Speaker: Robert Birdsall EPPM Group

Presentation Abstract

We will explore the complexities in today's scheduling software and the understanding needed to develop practical solutions using it. The intricacies of the combinations of Duration Type, Percent Complete Type and Activity Type coupled with the various "automated" updating techniques available will be explored and analyzed for their contribution to the efficient production of management information for schedule and cost.

Speaker Background

Robert Birdsall has been engaged in project controls for major projects for more than 25 years and has been applying software tools to them for his entire career. His current company, EPPM Professionals, LLC is an Oracle Gold Partner and has a consulting service agreement in place with Oracle Consulting. His experience includes a variety of roles in a wide variety of industries and he has worked in Oil and Gas, Engineering and Construction, Utilities, Defense, Government and Military, Manufacturing and Information Technology. Capital projects in our local area include: McCormick Place Expansion, Navy Pier Reconstruction, the United Terminal Number One at O'Hare, the Chicago Public School Evaluation and The Hyatt Hotel. He was on the project to "Federalize" the nations' airports following 9-11 and the formation of the TSA and Department of Homeland Security.

Case Study: Use of Project Controls and Defining Work Flow Streams for BP 12 Pipe Still Outage Project

Speaker: Dave Koester, BMW Constructors

Presentation Abstract

This presentation explores the project controls and work flow streams for the BP 12 Pipe Still Outage Project. On this project, project controls were very robust, yet not complicated. Work flow streams were defined; all installed quantities had the work flow activities, work hours, and multiple attributes attached; and Earned Value Management linked to the schedule was used to identify progress, identify critical paths, and assess commodities and systems completion pace to forecast cost and completion timing. In addition, during the year-long module assembly period, supervisors engaged in multi-discipline interface planning with weekly work commitments that were measured and tracked.

Speaker Background

Dave Koester recently concluded 18 years as a project manager with BMW Constructors, leading industrial projects in the Chicago area from estimating and budgeting through collaborative planning, project controls, execution and successful turnover. For the erection of large refining process units, his team integrated all major contractors into a single plan and project controls. He emphasizes application of Lean Construction methods throughout projects, particularly in-depth collaborative planning involving all project stakeholders and construction interface planning among contractors with weekly production commitments

Upon completion of his civil engineering degree from Purdue in 1978, he served for 17 years in various engineering, maintenance and project roles with Amoco Oil in Whiting, Indiana. He now continues to support BMW Constructors with training, performance measurement, and other company initiatives.