

25TH ANNUAL



25TH LCI CONGRESS
OCTOBER 24-27, 2023

Assembling A Well-Oiled Team

Nicole Wood – Array Architects

Steve Greulich – Penn Medicine

Daniel Pietropola – McClure Company

Justin Wingenfield – Butz Family of Companies

25 YEARS OF LEARNING: SUPERCHARGE YOUR LEAN JOURNEY IN THE MOTOR CITY

Wednesday, October 25th – 3:30 PM

Presenter Introductions

Nicole Wood



Steve Greulich



Daniel Pietropola



Justin Wingenfield



Problem Statement

- Shorter schedules
 - Tighter budgets
- Race to gather the team
 - Team splits into silos
 - Creating poor team culture
 - Harder to achieve overall project success



How do we break the cycle?

Presentation Overview

TIME

EXPECTATIONS

ACKNOWLEDGE & APPRECIATE:

MINDSET



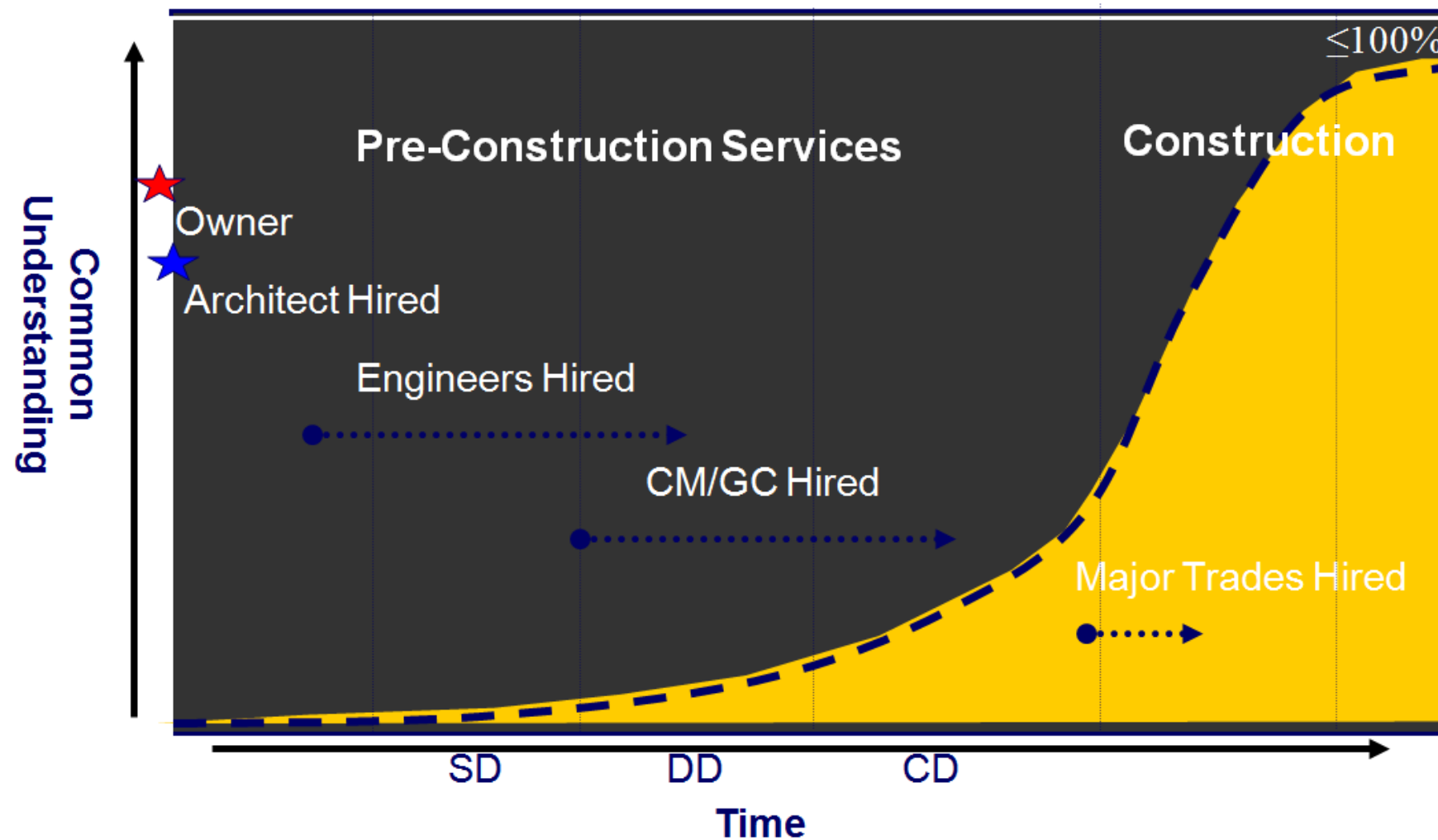
TIME

Go Slow to Go Fast – Do it Right the First Time
Purposeful planning of a process for selection



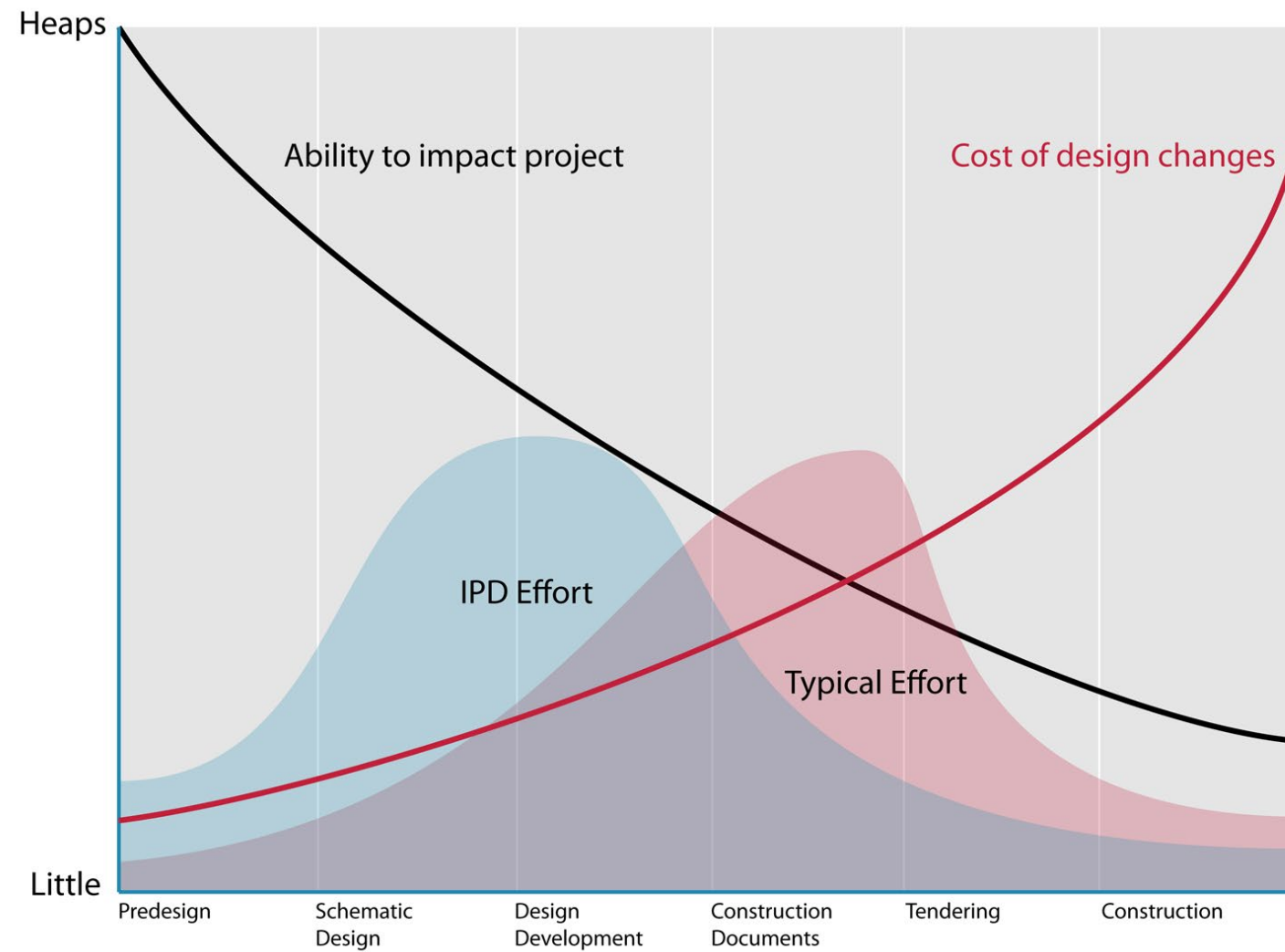
TIME Go Slow to Go Fast – Do it Right the First Time

Traditional Approach (Design, Bid, Build)



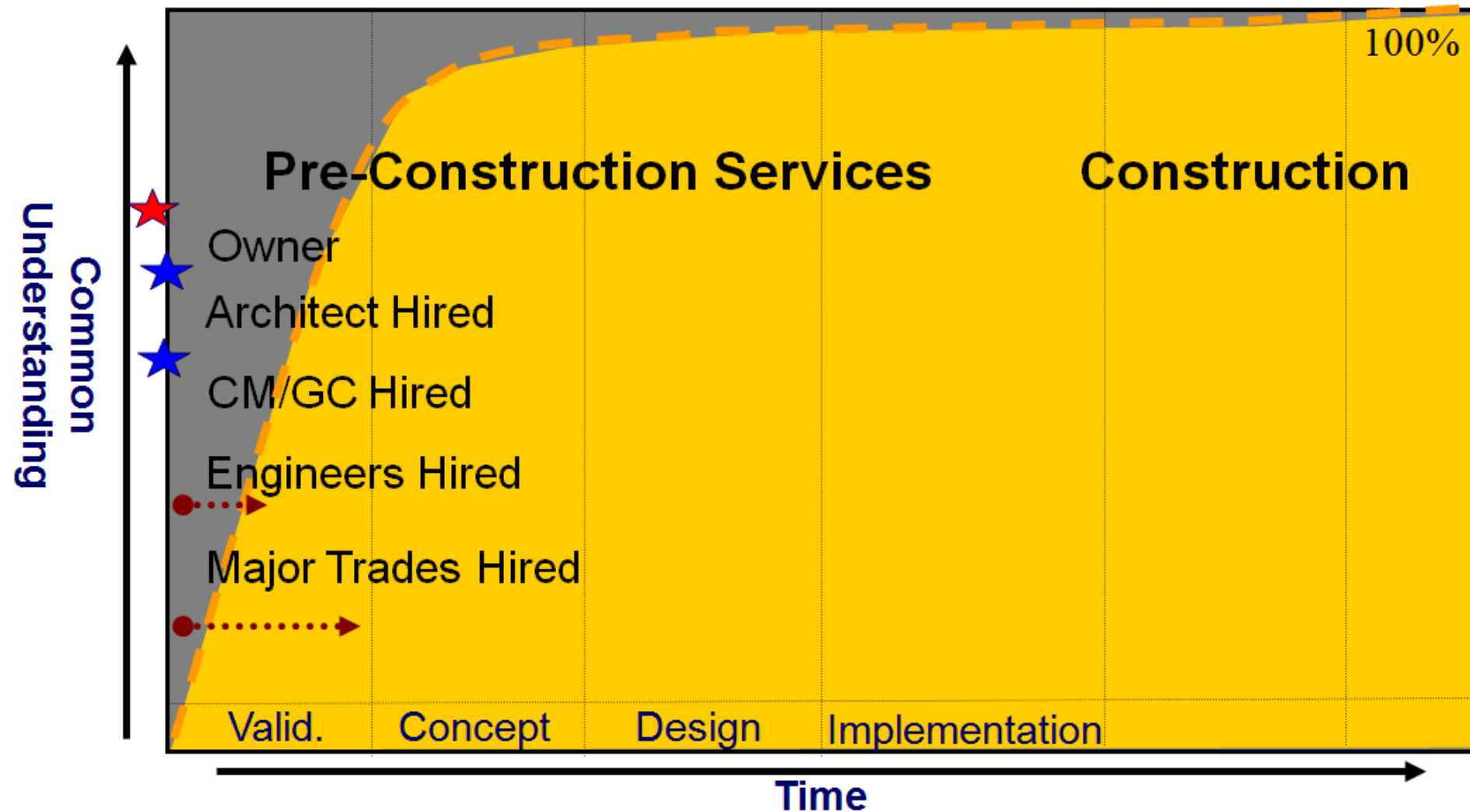
TIME Go Slow to Go Fast – Do it Right the First Time

MacLeamy Curve



TIME Go Slow To Go Fast – Do It Right The First Time

Integrated Project Delivery Approach



Identifying Key Trade Packages

- **Identifying trades that:**
 - Crucial to the success of the project
 - Fit the IPD and Key Trade Partner model
- **Goals:**
 - Find the best partner (not contract method)
 - Determine when they should be brought onboard
- **Scaling IPD to fit the project & region**

Onboarding Phases			
Phase I	Early Trade Partners - Q3 '22		
Phase II	Secondary Trade Partners - Q3 - Q4 '22		
Phase III	CD/BIM Trades - Q1 - Q2 '23		
Phase IV	Construction Onboarding - Q3 - Q4 '23		
Contract Types		*Note all DA subs default DA @Risk U.O.N.	
KTS (Profit @ Risk)	GMP		
Trade Partner Design Assist (DA)	GMP		
Early Purchase	LS		
Traditional	LS		
Div	Trade	Onboarding Phase	Contract Type
09	Framing/Gyp	Phase I	1. KTS
23	Mechanical	Phase I	1. KTS
26	Electrical	Phase I	1. KTS
99	Phase Break	Phase I	4. Phase Break
08	Façade - Glass & Glazing	Phase II	1. KTS
31	Sitework - Utilities & Excavation	Phase II	1. KTS
03	Precast Concrete	Phase II	2. DA
05	Structural Steel & Misc Metals	Phase II	2. DA
99	Phase Break	Phase II	4. Phase Break
03	Concrete	Phase III	2. DA
04	Masonry	Phase III	2. DA
05	Equipment Strut	Phase III	2. DA
07	Exterior Façade - Metal Panel	Phase III	2. DA
07	Roofing	Phase III	2. DA
08	DFH	Phase III	2. DA
08	Canopies	Phase III	2. DA
14	Elevators	Phase III	2. DA
21	Fire Protection	Phase III	2. DA
23	BAS	Phase III	2. DA
23	TAB	Phase III	2. DA
99	Phase Break	Phase III	4. Phase Break
13	RF Shielding	Phase IV	2. DA
01	Final Cleaning	Phase IV	3. Traditional
06	General Trades	Phase IV	3. Traditional
08	Interior Glass & Glazing	Phase IV	3. Traditional
06	Casework/Millwork	Phase IV	3. Traditional
09	Flooring - Resilient/CT/Resinous	Phase IV	3. Traditional
09	Painting	Phase IV	3. Traditional
10	Specialties	Phase IV	3. Traditional
10	Signage	Phase IV	3. Traditional
32	Sitework - Landscaping	Phase IV	3. Traditional

Educating Trade Partners

IPD & Lean

- Contract Clarity
- Define Expectations
- Lean Examples

Project

- Overview
 - Simple summary
 - Project goals
- Answer Questions
- Remove Concerns
- Evaluation Process
 - Steps
 - Selection Criteria



Penn Medicine Montgomeryville REQUEST FOR PROPOSAL

PROJECT DESCRIPTION

The CORE Integrated Project Delivery (IPD) team is seeking proposals from qualified firms to join as Key Trade Subcontractors or Design Assist Partners for Penn Medicine's new Multispecialty Care Out-Patient Facility in Montgomeryville, PA.

Your firm is invited to submit a proposal for the project as referenced above. We request that you submit your proposal by close of business, 10/14/22. CORE is requesting Trade Partners use lean construction principles to maximize value through efficiency and collaboration. The CORE team will be making interview selections (2-3 per trade) based upon the following criteria:

1. Individual Team Leads – Design & Construction Staff
2. Company Capacity – Resources, financial position, labor force, project history, backlog, BIM, VDC, prefabrication
3. Mindset of Innovation – Culture of collaboration, cutting edge technology adoption & willingness to adapt and learn
4. Local Workforce – Representation in local unions
5. IPD & Design Assist Experience – Understanding of IPD and ability to meet expectations, continuous estimating and TVD

Your response should consider our proposed project Conditions of Satisfaction:

- Schedule Certainty – Guaranteeing key project milestones
- Environmental & Community Impact – Minimizing our positive impact on the planet and our neighborhood
- Patient, Visitor & Staff Experience – Creating a facility that patients, visitors, & staff enjoy visiting
- Team Health, Culture & Safety – Making this a project where everyone wants to work
- Work Smart – Eliminating wastes and doing things right the first time

SUPPLEMENTAL INFORMATION LINKS

[Draft IPD Agreement](#)
[Draft AHB Subcontract Agreement](#)
[Preliminary Design Information Minimum Submission Requirements](#)

Trade Partner Proposals

- Choose Contractors who understand the expectations as Key Trade Partners for interviews
 - Did their submission follow the guidelines?
 - Did they provide the required information?
 - Did they prioritize Conditions of Satisfaction?
- Weighted scoring
- Convey interview expectations

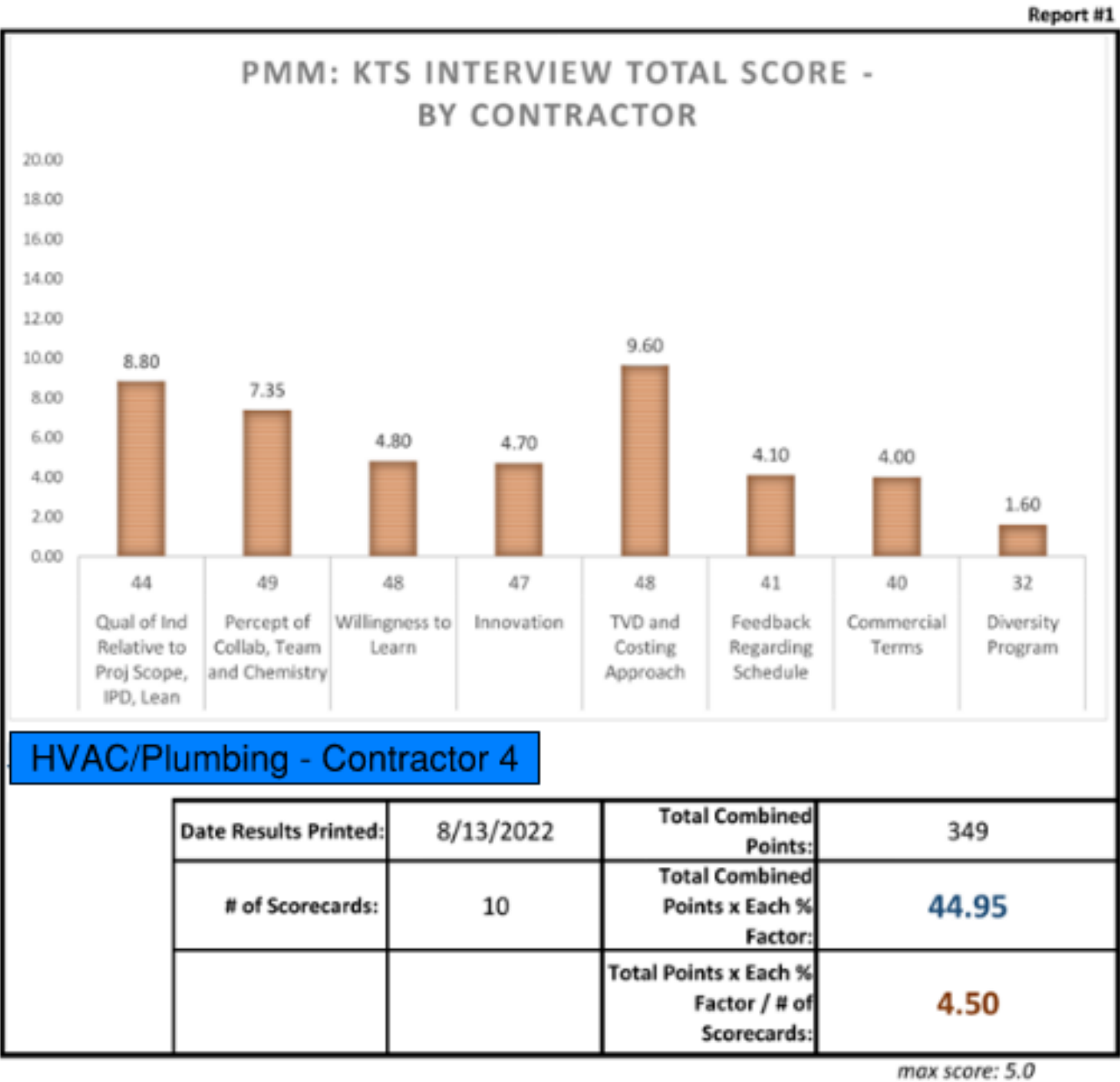
Metrics and Scoring		WEIGHT	AWARDED POINTS	TOTAL
-- It's all about the People! --				
Scores: 5 = Very Good, 3 = Average, 1 = Poor (No Decimals, 1/2 points, etc.)				
1. Qualifications of Individuals Relative to Project Scope, IPD, and Lean			Fill in This	
a. Does their team have relavent IPD, Lean, Design Assist or healthcare experience?		20%		0
b. Did they demonstrate an 'above and beyond' approach to any aspect?				
c. Did they show positivity and enthusiasm about IPD structure?				
2. Perception of collaboration, team and chemistry				
a. Do you get the sense that the proposed team members have worked together before?		15%		0
b. Is there good continuity from precon to construction?				
c. How did the team interact?				
d. Do they seem to embrace a collaborative mindset?				
e. Are they someone that you could see yourself sitting around the table with working thru challenges?				
3. Willingness to Learn				
a. Do you get the sense the group/company is forward thinking? Are they open to new Ideas? Open to learning?		10%		
4. Innovation				
a. Did they present a realistic/feasible/thought provoking approach to the project?		10%		0
b. Did they demonstrate they understand what it will take to meet the requirements of the project (time (day to day and overall, cost)?				
c. Do they have VDC & BIM capabilities? In house our outsourced?				
d. What's their experience with prefab?				
5. Target Value Design and Costing Approach				
a. Do you feel they understand the expectations during the TVD process?		20%		0
b. Are you comfortable with their methodology for delivering real-time estimating?				
c. Do they have the resources to deliver on the precon expectations?				
6. Feedback Regarding Schedule				
a. How's their backlog look based on the size of our project?		10%		0
b. Do they have the workforce capacity (office & field) to deliver on this project?				
c. Shop capacity to meet or improve the schedule				
7. Commerical Terms				
a. Profit %, overhead %, hourly rates and additional terms.		10%		0
10. Diversity Program (MBE, WBE, DBE)				
a. Do they qualify as MBE/WBE/DBE?		5%		0
GRAND TOTAL				
Tally all Sections		100%	0	0

Trade Partner Interviews

- Choose the Interviewers
- Choose People who:
 - Want to be part of the project
 - Want to be collaborative & innovative
- Set the stage - Create an environment of collaboration
 - Round Table discussion
 - Encourage everyone to speak
- What to evaluate
 - Are the answers in line with the project mission?
 - Team Chemistry
 - Taste for innovation



Trade Partner Selection



Contractor 1	Contractor 2	Contractor 3	Contractor 4	Contractor 5
Weighted Score	Weighted Score	Weighted Score	Weighted Score	Weighted Score
3.870	4.510	3.340	4.500	3.790

Legend:		Weights (% Factors)
Date Results Printed:	Will always return today's date	20% - Qualifications of Individuals Relative to Project Scope, IPD, Lean
Diversity Program:	"YES" - A Diversity Program is in place; "NO" - A Diversity Program is not in place	15% - Perception of Collaboration, Team and Chemistry
Total Combined Points:	A combined total of all Scorecard points [for all entries], [all Sections] for the filtered Contractor.	10% - Willingness to Learn
Total Combined Points x Each % Factor:	Calculated by adding the total points for each section of the form, and then multiplying those points by the %factor for each Section. The "Total Points" is a total of all the Form entries for this Section, for the filtered Contractor.	10% - Innovation
Total Points x Each % Factor / # of Scorecards:	Calculated by dividing "Total Combined Points x Each % Factor" by the # of Scorecard Forms entered for the filtered Contractor. This provides an overall AVERAGE result for the filtered Contractor.	20% - TVD and Costing Approach
		10% - Feedback Regarding Schedule
		10% - Commercial Terms
		5% - Diversity Program



EXPECTATIONS

Expect the Best and Hold the Bar High

Develop desired criteria for what is expected of a potential team member.



Expectations **Expect the Best and Hold the Bar High**

- Onboarding
- Predictive Index
- Lean / IPD Education
- Team Charter

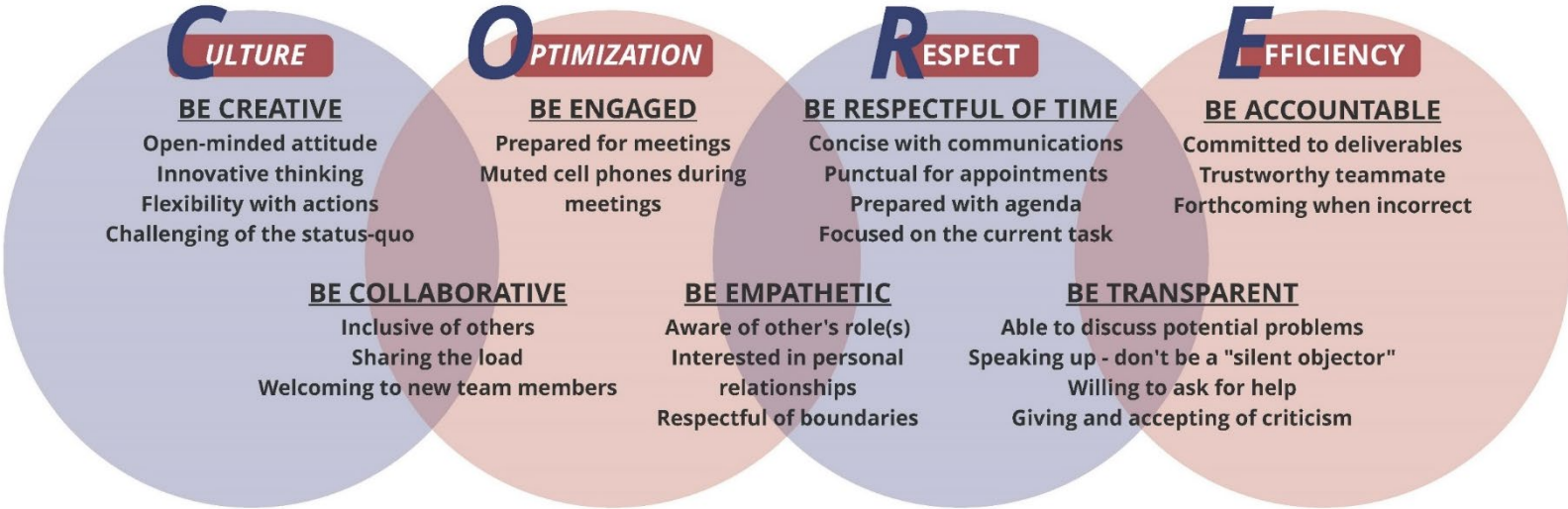


Expectations Expect the Best and Hold the Bar High

CONDITIONS OF SATISFACTION

- ☐ **Schedule Certainty**
Guaranteeing key project milestones
- ☐ **Patient, Visitor & Staff Experience**
Creating a facility that Patients, Visitors & Staff enjoy
- ☐ **Work Smart**
Eliminating wastes and doing things right the first time
- ☐ **Environmental & Community Impact**
Maximize the positive impact on the planet and our neighborhood
- ☐ **Team Health, Culture & Safety**
Making this a project where everyone wants to work

TEAM BEHAVIORS



Expectations Expect the Best and Hold the Bar High



ACKNOWLEDGE & APPRECIATE

Respect for People

Realize the value of the team and each person individually.



ACKNOWLEDGE & APPRECIATE Respect for People

- ✓ Authentic
- ✓ Self Awareness
- ✓ Acknowledge vs. Appreciation

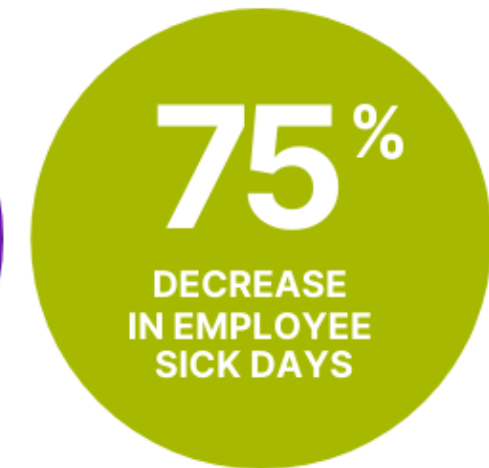


*“There’s a \$10 cover charge to enter.
But the boss wants you to know that
he appreciates you.”*

ACKNOWLEDGE & APPRECIATE Respect for People

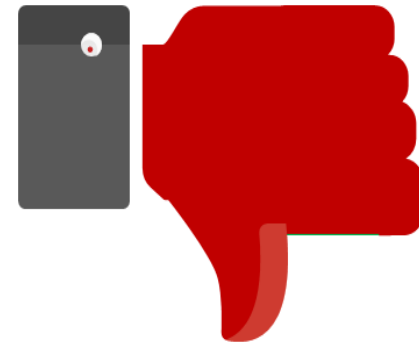
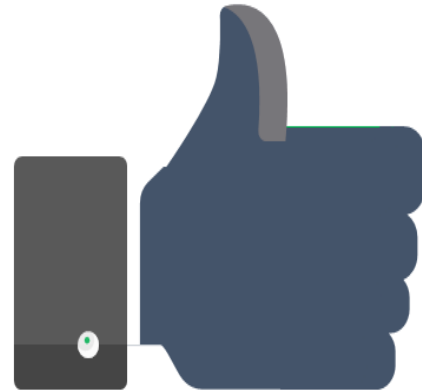
- ✓ Trust
- ✓ Engagement
- ✓ Culture
- ✓ Innovation
- ✓ Performance

**A STRONG SENSE OF WORKPLACE
BELONGING AND INCLUSION LEADS TO**



ACKNOWLEDGE Respect for People

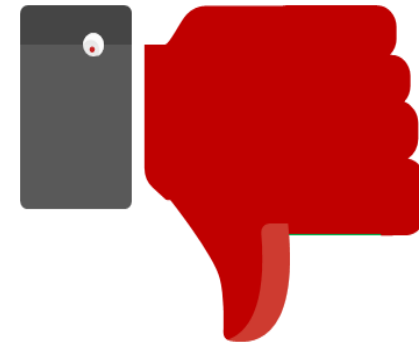
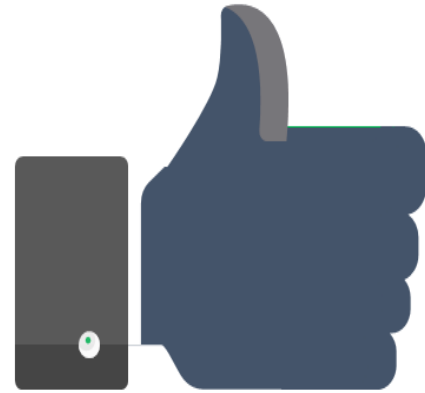
- Listen
- Understand
- Platform
- Recognition
- Transparency
- Clarity
- Take Responsibility



- Distractions
- Assume
- Interruptions
- Criticize
- Avoid
- Ambiguity
- Blame

APPRECIATE *Respect for People*

- Express Gratitude
- Respect
- Check In
- Positive 5 to 1
- Invest in People
- Know your Team



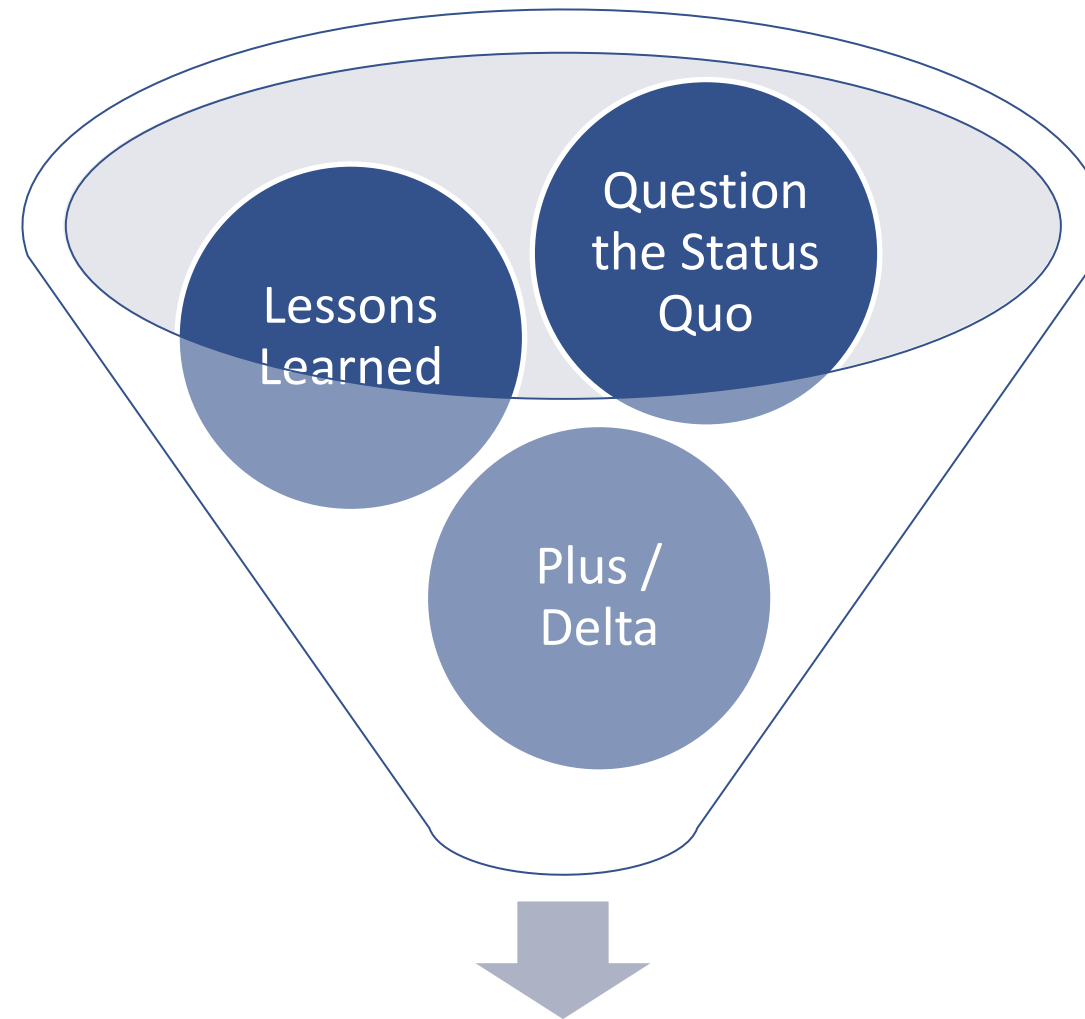
- Self-Centered
- Contempt
- Over Commit
- Critical
- Short sighted
- All business

MINDSET

Foster a mindset of continuous improvement and build upon lessons learned.
Create a culture where change is not only accepted but also expected.



MINDSET Foster a mindset of continuous improvement and build upon lessons learned



Continuous Improvement



In the spirit of continuous improvement, we would like to remind you to complete this session's survey!
We look forward to receiving your feedback.



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Daniel Pietropola
Business Development



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Thank you for attending this presentation. Enjoy the rest of the 25th Annual LCI Congress!