

The logo features the word "Gilbane" in white text on a red rectangular background, followed by the number "150" in a large, bold, grey sans-serif font.

**Gilbane 150**

# Gilbane Rising Contractors Program

Session Four  
Managing for Success

April 26, 2022



# Ground Rules & Expectations for this Zoom Session



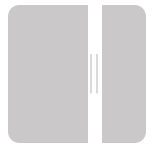
This one-hour session **will be recorded**.



**Ask questions** in the chat or verbally in breakout sessions.



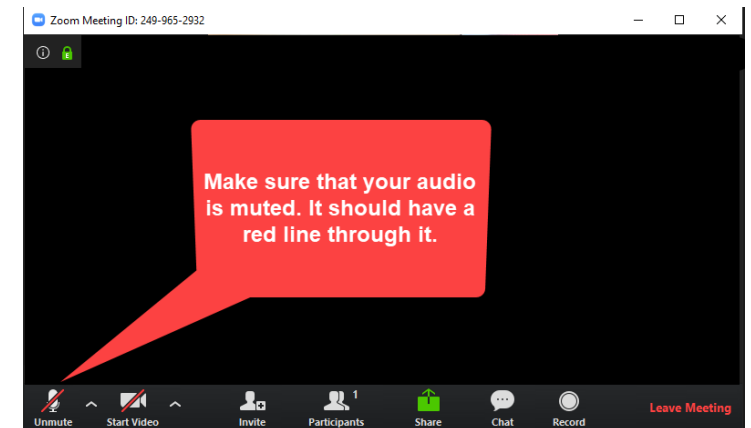
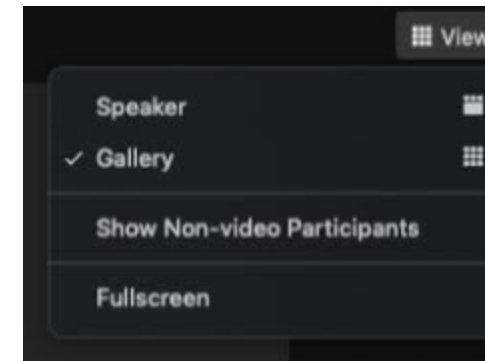
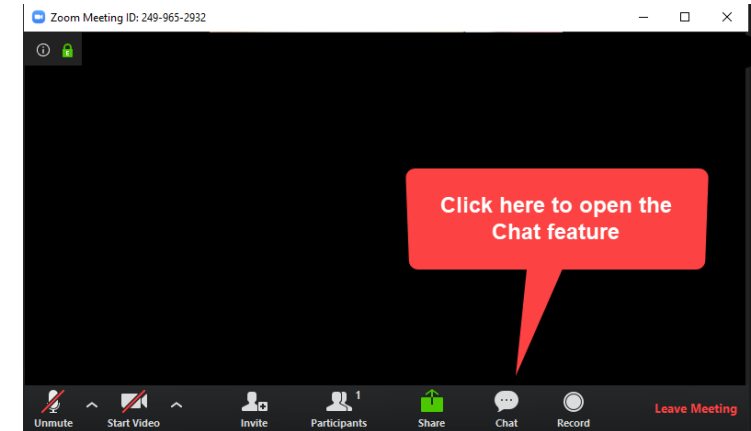
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You can **expand/contract** the viewing windows by sliding the handle between panels.



Please **stay on mute** during initial presentation.



# Welcome!

Just a couple of housekeeping items before we get started.

## Your Zoom Name:

Please "rename" yourself using the following convention:

**Your State\_Your Name\_Your Company**

For example: NY\_John Rooney\_Gilbane

*Click the participants tab, then "more" next to your name. Click Rename.*

## Regions:

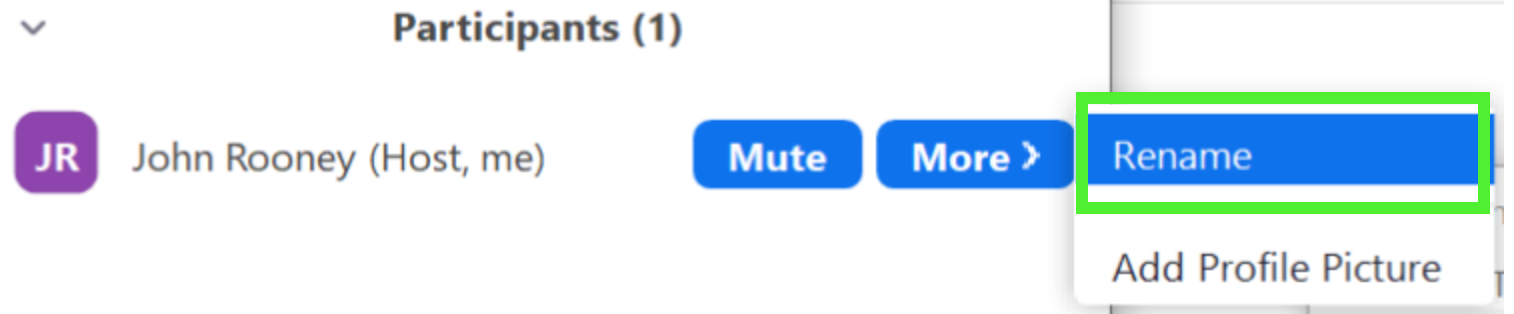
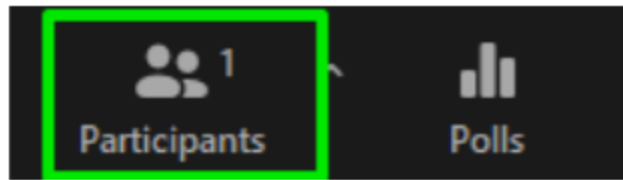
**NY** (New York)

**MARO** (Mid-Atlantic/DC)

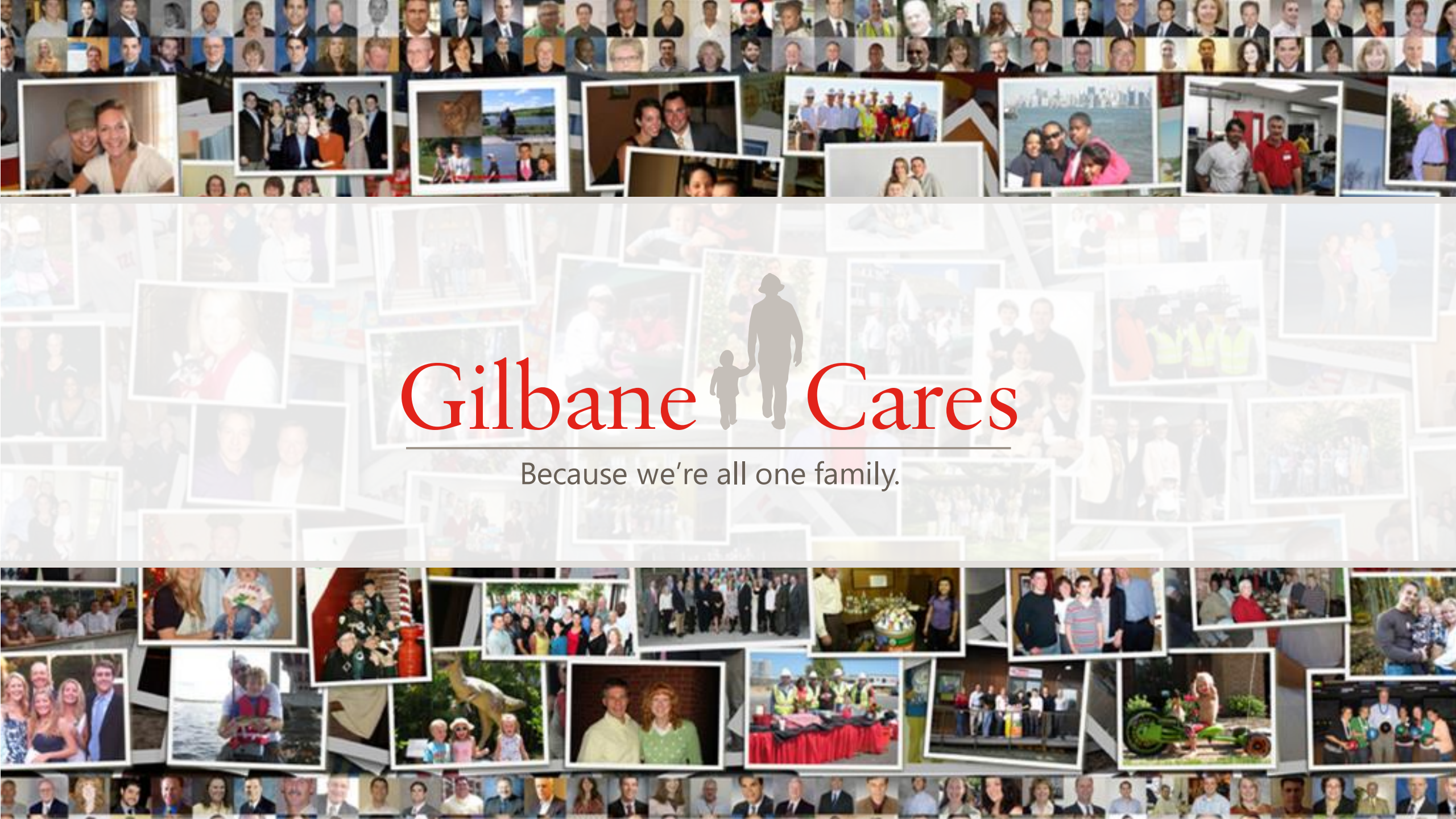
**SE** (Southeast/Florida)

**OH** (Cleveland/Columbus)

**MW** (Chicago and Milwaukee)







# Gilbane Cares

Because we're all one family.



# Introductions



**Erika Allanson**

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# Project Management: Getting Started

## Front-End Documents:

- All GBC Required Items
- Overview of Systems (next slide)

## Kick-off Process:

- Expectations prior to start of work

## Document Control:

- Submittals/RFIs and Procore
- Submittal Schedule
- Material & Equipment Status Report (MESR)



# Project Management: Gilbane Systems

**IBidPro**: Pre-Qualification (currently transitioning to Compass), Bidding, Contracts and Change Orders

**SmartBid/ Building Connected**: Bidding on Interiors projects

**Procore**: Drawings, Specifications, RFIs, Submittals, Meeting Minutes, Daily Reports, Punchlist and Inspections

**Textura**: Payment Requisitions

**SmartApp**: Safety Orientation/Incidents (viewing only)

**SafetyNet**: Safety Inspections (viewing only)





# Project Management: Project Execution

## Quality Management:

- Pre-Installation Meetings
- Inspections (in Procore) / RCL
- Punchlist
- Article 15 – QA/QC Contract Conditions

## Schedule Management:

- Look-Ahead Schedules
- Notification Provisions
- Manpower to Meet Schedule





# Project Management: Project Execution

## Safety Management:

- Submit Safety Plan / STAs / JHAs
- Note Gilbane's Above-OSHA Requirements
- Safety Orientations in SmartApp/Procore
- OSHA 30 / SST 62 hour (NYC only)
- Daily Reports (in Procore)
- Stretch & Flex Program
- Toolbox Talks



# Project Management: Financial Mgmt.

## Change Order Management:

- Notification Provisions
- Itemize labor and material on COs
- Include all applicable back-up
- Use labor and material rates per contract
- Sign COs in iBidPro for payment in Textura
- Allowance Tracking per Agreement with Gilbane PM - T&M or Proposal
- Submit Monthly CO Log





# Project Management: Financial Mgmt.

## Payment Requisitions:

- Processed via Textura
- Submit itemized SOV for approval
- COs will appear in Textura once signed
- Sworn Statement including Suppliers & 2nd Tier (upon req submission)
- Include Certified Payroll, Insurance, and Lien Waivers (for payment)



# Project Management: General

## General / Communication:

- Attend weekly meetings (PM and Foremen)
- Ensure member of your team understands programs (Procore, SmartApp, Textura, etc.)
- Ensure proper communication between office and field
- Be professional and respectful
- **USE YOUR MENTOR!!!**





# Key Takeaways for Project Management

## 1. Getting Started:

- > Obtain Gilbane project team contact info for your scope
- > Familiarize yourself with the Front-Ends, deliverables and notification provisions
- > Familiarize yourself with project scope and contract documents

## 2. Project Execution:

- > Learn Gilbane systems and know what applies to your scope of work
- > Share knowledge with the Gilbane project team on how to enhance quality, schedule and safety for your scope
- > Manage the schedule of your work carefully (notify Gilbane PM of delays as soon as they are known)
- > Be professional via correspondence and in meetings

## 3. Financial Management:

- > Apply contractual labor/material rates and mark-ups correctly to COs
- > Submit notifications of scope/schedule changes and COs in accordance with the timeframes listed in the contract
- > Submit reqs on time and with proper back-up
- > Submit complete COs (include all back-up to minimize back-and-forth)

# Project Scheduling

Managing Scheduling Conflicts, Time, and Resources

Presented by:



**Jodi Staub**

**Sr Operational Risk Manager**

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# Planning and Scheduling: What to Expect

- The Development of the “Master Project Schedule”
- Monthly Schedule Updates
- Managing the Schedule at the Field Level
- Managing Scheduling Conflicts in the Field
- Managing the “Changes in the Work” in the Project Schedule
- Summary

# Developing the Master Schedule

- Expansion of the bid schedule with more complete documents
- Subcontractor input and buy in is key
  - Done through planning sessions



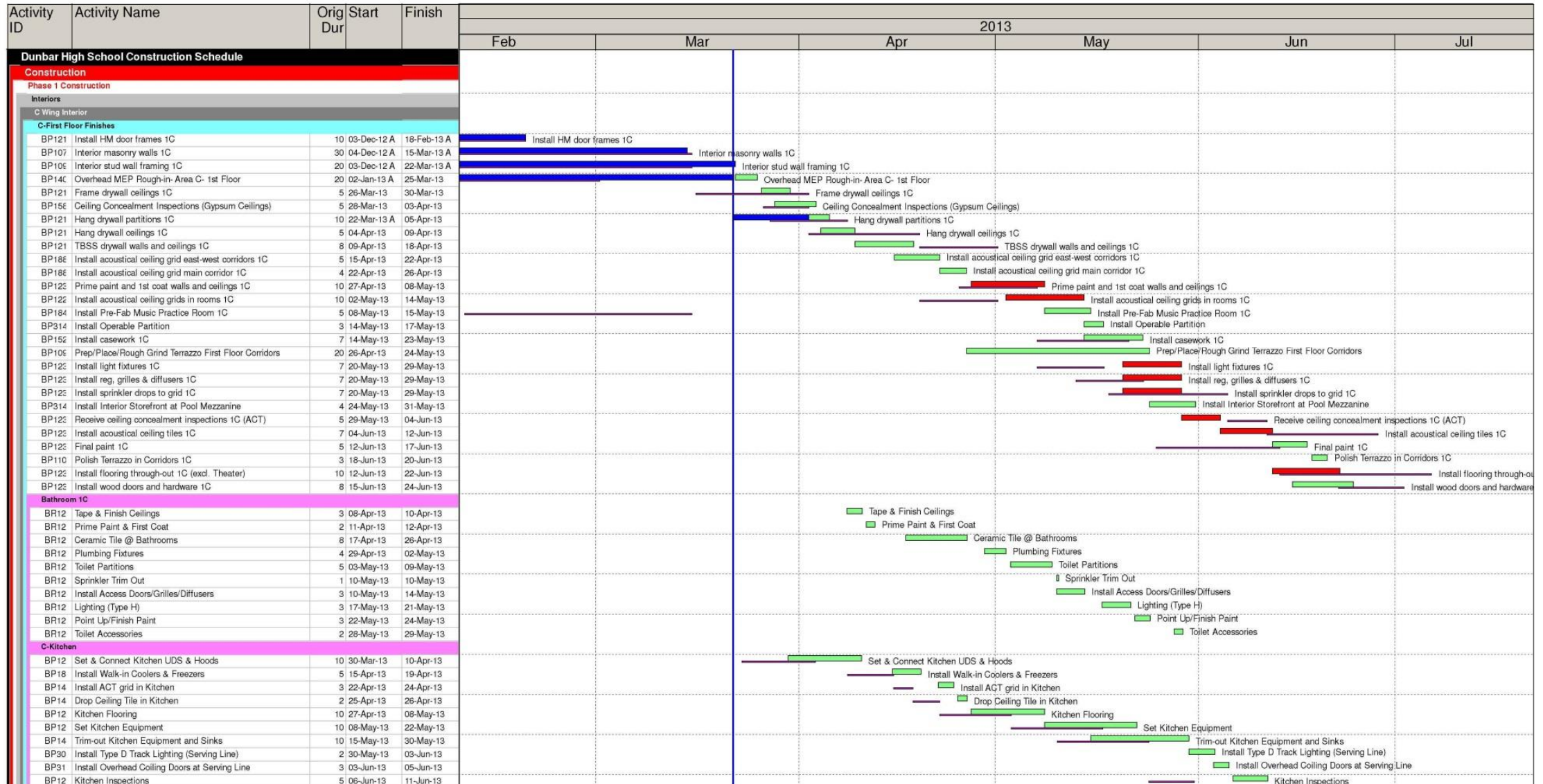
# Monthly Schedule Updates

- Field walk with foremen and superintendents
- Realistic assessment of progress
- Real delivery dates for key submittals and materials
- Identification of challenges/problems/anything holding up work
- Once the update is done, validation of the look ahead





# Monthly Schedule Updates



# Monthly Schedule Updates

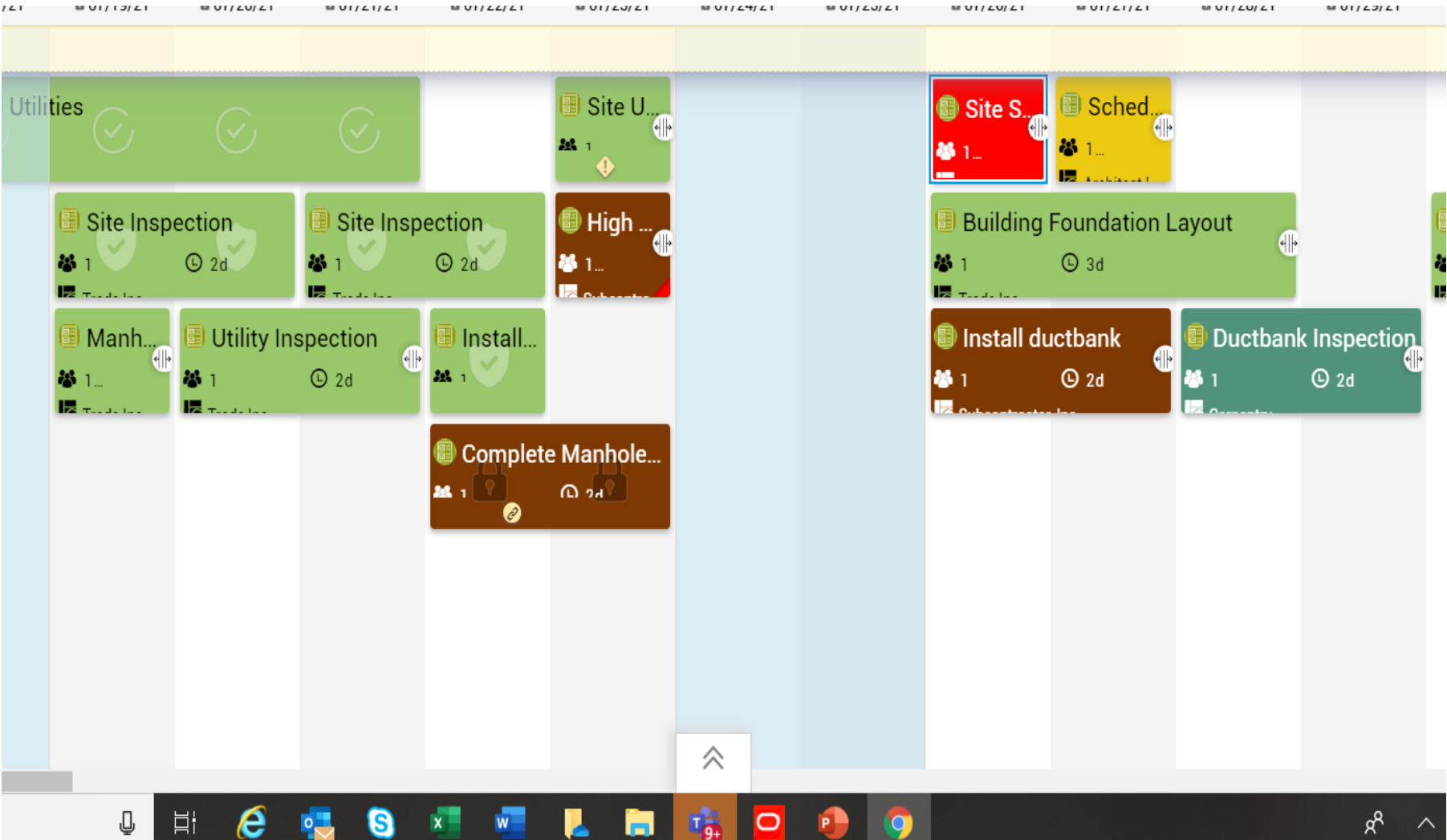
Activity ID	Activity Name	Orig	Start	Finish	Total	2013												M
						Apr												
Dunbar High School Construction Schedule																		
Construction																		
Phase 1 Construction																		
Structure																		
SP100	Excav Steel Sec 19 & 20 (JPV Trail)		5/2 Mar-13	20 Mar-13	20	Excav Steel Sec 19 & 20 (JPV Trail)												
Frame & Roof																		
SP101	Buildout Building Westinghouse Area C (Library Admin Wing)		5/2 Mar-13		10	Building Westinghouse Area C (Library Admin Wing)												
SP102	Install Curtain Wall Framing 2nd & 3rd Floor (A-South)		11/14 Feb-13	22 Mar-13	21	Install Curtain Wall Framing 2nd & 3rd Floor (A-South)												
SP103	Install Curtain Wall Glazing (A-South)		4/10 Feb-13	20 Mar-13	21	Install Curtain Wall Glazing (A-South)												
SP104	Frame Metal Panel Soffit (A-South)		5/10 Mar-13	18 Mar-13	9	Frame Metal Panel Soffit (A-South)												
SP105	Apply Airborne Sound Coating on Noise Isolation		3/22 Mar-13	20 Mar-13	9	Apply Insulation on Noise Isolation												
SP106	Install Metal Panels (A-South)		10/1 Apr-13	12 Apr-13	3	Install Metal Panels (A-South)												
East Building																		
SP107	Install Metal Framing (B-North)		11/14 Feb-13	22 Mar-13	19	Install Metal Framing (B-North)												
SP108	Install Metal Panel Soffits at Reading Room Soffit		10/1 Mar-13	20 Mar-13	10	Install Metal Panel Soffits at Reading Room Soffit												
SP109	Apply Airborne Sound Coating on Noise Isolation		2/22 Mar-13	20 Mar-13	9	Apply Airborne Sound Coating on Noise Isolation												
SP110	Apply Airborne Sound Coating on Noise Isolation		1/20 Mar-13	20 Mar-13	10	Apply Airborne Sound Coating on Noise Isolation												
SP111	Install Metal Panels (B-East)		5/10 Mar-13	11 Apr-13	12	Install Metal Panels (B-East)												
SP112	Install Curtain Wall / Storefront at Main Entrance		12/2 Mar-13		10	Install Curtain Wall / Storefront at Main Entrance												
East Building Interior																		
SP113	Install Architectural Louvers (C-East)		5/10 Mar-13	10 Apr-13	20	Install Architectural Louvers (C-East)												
SP114	Install Face Brick (GL, H to GL) (C-East)		5/10 Mar-13	20 Mar-13	10	Install Face Brick (GL, H to GL) (C-East)												
SP115	Clean & Wash Down Masonry (C-East)		10/1 Mar-13	22 Mar-13	10	Clean & Wash Down Masonry (C-East)												
SP116	Install Vertical Insulation & TPO at Parapets		10/1 Mar-13	14 Apr-13	10	Install Vertical Insulation & TPO at Parapets												
SP117	Install Acoustic Containment at Theater		7/10 Mar-13	27 Mar-13	10	Install Acoustic Containment at Theater												
SP118	Install Curtain Wall Framing (C-West)		5/10 Mar-13	14 Apr-13	10	Install Curtain Wall Framing (C-West)												
SP119	Install Curtain Wall Glazing (C-West)		7/10 Mar-13	15 Apr-13	10	Install Curtain Wall Glazing (C-West)												
SP120	Clean & Wash Down Masonry (C-North)		10/1 Mar-13	22 Mar-13	10	Clean & Wash Down Masonry (C-North)												
SP121	Complete CS-1 Face Brick at Garage & North E		10/1 Mar-13	14 Apr-13	10	Complete CS-1 Face Brick at Garage & North Entrance												
SP122	Take Down Soffits (C-North)		2/10 Mar-13	27 Mar-13	4	Take Down Soffits (C-North)												
SP123	Take Down Soffits (C-East)		2/10 Mar-13	27 Mar-13	4	Take Down Soffits (C-East)												
SP124	Frame Metal Panel Soffit (C-East)		5/10 Mar-13	14 Apr-13	10	Frame Metal Panel Soffit (C-East)												
SP125	Install Curtain Wall Framing (C-East)		10/1 Mar-13	14 Apr-13	10	Install Curtain Wall Framing (C-East)												
SP126	Install Curtain Wall Glazing (C-North)		10/1 Mar-13	14 Apr-13	10	Install Curtain Wall Glazing (C-North)												
SP127	Install Metal Framing at Perimeter (C-North)		10/1 Mar-13	14 Apr-13	10	Install Metal Framing at Perimeter (C-North)												
SP128	Install Metal Panel Soffit (C-North)		10/1 Mar-13	14 Apr-13	10	Install Metal Panel Soffit (C-North)												
SP129	Frame Metal Panel Soffit (C-West)		10/1 Mar-13	14 Apr-13	10	Frame Metal Panel Soffit (C-West)												
SP130	Install Curtain Wall Glazing (C-North)		10/1 Mar-13	14 Apr-13	10	Install Curtain Wall Glazing (C-North)												
SP131	Install Curtain Wall Glazing (C-East)		10/1 Mar-13	14 Apr-13	10	Install Curtain Wall Glazing (C-East)												
MEP Installation/Work																		
SP132	Excavate & Pile Up Area A1-A4&6		11/1 Mar-13	20 Mar-13	10	Excavate & Pile Up Area A1-A4&6												
SP133	Excavate & Pile Up Area A1-A4&6, OASIS A&B&C		11/1 Mar-13	20 Mar-13	10	Excavate & Pile Up Area A1-A4&6, OASIS A&B&C												
SP134	Set Water Source Heat Pump in Area A		11/1 Mar-13	20 Mar-13	10	Set Water Source Heat Pump in Area A												
Switchgear, Feeders, and Panels																		
SP135	Feed & Terminate Feeders from Generator to Switchgear		5/10 Mar-13	20 Mar-13	10	Feed & Terminate Feeders from Generator to Switchgear												
SP136	PEPCO Set Transformer		1/20 Mar-13	14 Apr-13	10	PEPCO Set Transformer												
SP137	PEPCO Installation of Permanent Power (Primary Feeds)		1/20 Mar-13	14 Apr-13	10	PEPCO Installation of Permanent Power (Primary Feeds)												
SP138	PEPCO Installation of Secondary Feeds to Switchgear		1/20 Mar-13	14 Apr-13	10	PEPCO Installation of Secondary Feeds to Switchgear												
SP139	Emergency Permanent Power		0/1 Mar-13	10 Apr-13	10	Emergency Permanent Power												
SP140	Terminate Feeders & Power to Condenser Water P.		5/10 Mar-13	10 Apr-13	10	Terminate Feeders & Power to Condenser Water Pumps												
Plumbing																		
SP141	Drill Gopher Hole Walls, Phase 1 Lower Field		4/20 Mar-13	20 Mar-13	10	Drill Gopher Hole Walls, Phase 1 Lower Field												
SP142	Install Horizontal CDR Piping at Lower Field		5/10 Mar-13	12 Apr-13	10	Install Horizontal CDR Piping at Lower Field												
SP143	Flush, Pressure Test, and Fill Gopher Field		5/10 Mar-13	12 Apr-13	5	Flush, Pressure Test, and Fill Gopher Field												
A-Wing Interior																		
SP144	Ceramic Tile @ Bathrooms		5/10 Mar-13	20 Mar-13	20	Ceramic Tile @ Bathrooms												
SP145	Ceramic Tile Wall/Hanging & Finish		8/20 Mar-13	14 Apr-13	10	Ceramic Tile Wall/Hanging & Finish												
SP146	Install elevator #1		25/1 Mar-13	14 Apr-13	10	Install elevator #1												
SP147	Prep/Finish Rough Grid Control Terrace 4th		7/17 Mar-13	14 Apr-13	10	Prep/Finish Rough Grid Control Terrace 4th												
SP148	Ceramic Tile @ Bathrooms		5/10 Mar-13	12 Apr-13	20	Ceramic Tile @ Bathrooms												
SP149	Prime & First Coat Paint		2/10 Apr-13	10 Apr-13	10	Prime & First Coat Paint												
SP150	Ceramic Tile Wall/Hanging & Finish		8/20 Mar-13	14 Apr-13	10	Ceramic Tile Wall/Hanging & Finish												
SP151	Ceramic Tile @ Bathrooms		5/10 Mar-13	12 Apr-13	20	Ceramic Tile @ Bathrooms												
SP152	Prep/Finish Rough Grid Control Terrace 3rd		7/17 Mar-13	14 Apr-13	10	Prep/Finish Rough Grid Control Terrace 3rd												
SP153	Install Lighting		2/10 Apr-13	10 Apr-13	10	Install Lighting												
SP154	Ceramic Tile @ Bathrooms		5/10 Mar-13	12 Apr-13	20	Ceramic Tile @ Bathrooms												
SP155	Prime & First Coat Paint		2/10 Apr-13	10 Apr-13	10	Prime & First Coat Paint												
SP156	Install FOU		2/10 Apr-13	10 Apr-13	10	Install FOU												
MEP Installation/Work																		
SP157	Hang drywall ceilings B-Wing		11/1 Mar-13	20 Mar-13	10	Hang drywall ceilings B-Wing												
SP158	TSSS drywall ceilings B-Wing		10/1 Mar-13	14 Apr-13	10	TSSS drywall ceilings B-Wing												
SP159	Field Measure for Precast Tensos		10/1 Mar-13	14 Apr-13	10	Field Measure for Precast Tensos												
SP160	Field Measure for Precast Tensos		10/1 Mar-13	14 Apr-13	10	Field Measure for Precast Tensos												
SP161	Hang gypsum beams at Armory		5/20 Mar-13	20 Mar-13	20	Hang gypsum beams at Armory												
SP162	Hang drywall ceilings B-Wing		11/1 Mar-13	20 Mar-13	10	Hang drywall ceilings B-Wing												
SP163	TSSS gypsum beams at Armory		10/1 Mar-13	14 Apr-13	10	TSSS gypsum beams at Armory												
SP164	Prime paint and 1st coat walls and ceilings B-Wing		10/1 Mar-13	14 Apr-13	10	Prime paint and 1st coat walls and ceilings B-Wing												
MEP Installation/Work																		
SP165	Overhead MEP Rough-in Area C-1st Floor		20/10 Mar-13	10 Apr-13	10	Overhead MEP Rough-in Area C-1st Floor												
SP166	Overhead MEP Rough-in Area C-2nd Floor		20/10 Mar-13	10 Apr-13	10	Overhead MEP Rough-in Area C-2nd Floor												
SP167	Interior masonry walls and JC		10/1 Mar-13	14 Apr-13	10	Interior masonry walls and JC												
SP168	Install GCMW walls around pool		10/1 Mar-13	20 Mar-13	20	Install GCMW walls around pool												
SP169	Options Ceiling Framing		10/1 Mar-13	14 Apr-13	10	Options Ceiling Framing												
SP170	Install Plywood on Wings		10/1 Mar-13	14 Apr-13	10	Install Plywood on Wings												
SP171	Install Conduit and Wire for Type H House Lights		10/1 Mar-13	14 Apr-13	10	Install Conduit and Wire for Type H House Lights												
SP172	Complete CMU Walls		5/10 Mar-13	14 Apr-13	10	Complete CMU Walls												
SP173	Frame Ceiling		10/1 Mar-13	14 Apr-13	10	Frame Ceiling												
SP174	Hang drywall ceilings 1C		10/1 Mar-13	14 Apr-13	10	Hang drywall ceilings 1C												
SP175	Install Plywood at Battery		5/20 Mar-13	20 Mar-13	20	Install Plywood at Battery												
SP176	Install Front of House Window		5/20 Mar-13	20 Mar-13	10	Install Front of House Window												
SP177	Overhead Conduit Rough-in		5/20 Mar-13	20 Mar-13	10	Overhead Conduit Rough-in												
SP178	Complete CMU Walls		10/1 Mar-13	14 Apr-13	10	Complete CMU Walls												
SP179	Set up Post Scaffolding		10/1 Mar-13	14 Apr-13	10	Set up Post Scaffolding												
SP180	Hang drywall ceilings 1C		10/1 Mar-13	14 Apr-13	10	Hang drywall ceilings 1C												
SP181	Frame drywall ceilings 2C		5/20 Mar-13	30 Mar-13	10	Frame drywall ceilings 2C												
SP182	Frame drywall ceilings 2C		10/1 Mar-13	14 Apr-13	10	Frame drywall ceilings 2C												
SP183	Ceiling Conduit Installation (Gypsum Ceiling)		5/20 Mar-13	10 Apr-13	10	Ceiling Conduit Installation (Gypsum Ceiling)												
SP184	Hang drywall at Battery		5/20 Mar-13	10 Apr-13	10	Hang drywall at Battery												
SP185	Paint Overhead		8/20 Mar-13	10 Apr-13	10	Paint Overhead												
SP186	Set & Connect Kitchen UDS & Hoods		10/1 Mar-13	14 Apr-13	10	Set & Connect Kitchen UDS & Hoods												
SP187	Install Plywood on Ceiling		8/20 Mar-13	10 Apr-13	10	Install Plywood on Ceiling												
SP188	Ceiling Conduit Installation (Gypsum Ceiling)		5/20 Mar-13	10 Apr-13	10	Ceiling Conduit Installation (Gypsum Ceiling)												
SP189	MEP Flow Out at Battery Drain		5/20 Mar-13	10 Apr-13	10	MEP Flow Out at Battery Drain												
SP190	Hang drywall ceilings 1C		8/20 Mar-13	10 Apr-13	10	Hang drywall ceilings 1C												
SP191	Hang drywall at Battery		7/20 Mar-13	10 Apr-13	10	Hang drywall at Battery												
SP192	Ceiling Framing		5/20 Mar-13	10 Apr-13	10	Ceiling Framing												
SP193	Hang drywall ceilings 2C		8/20 Mar-13	12 Apr-13	10	Hang drywall ceilings 2C												
SP194	Overhead Conduit Installation		5/20 Mar-13	10 Apr-13	10	Overhead Conduit Installation												
SP195	Install Anchors for Ceiling Mounted Items		5/20 Mar-13	10 Apr-13	10	Install Anchors for Ceiling Mounted Items												
SP196	Hang drywall on Wings		7/20 Mar-13	14 Apr-13	10	Hang drywall on Wings												
SP197	Type & Finish Ceilings		3/10 Apr-13	10 Apr-13	10	Type & Finish Ceilings												
SP198	Options Ceiling Inspections		3/10 Apr-13	10 Apr-13	10	Options Ceiling Inspections												
SP199	Hang drywall ceilings 2C		8/20 Mar-13	10 Apr-13	10	Hang drywall ceilings 2C												
SP200	Install Type H House Lights		5/10 Apr-13	14 Apr-13	10	Install Type H House Lights												
SP201	Prime Paint & First Coat		2/10 Apr-13	10 Apr-13	10	Prime Paint & First Coat												
SP202	Hang & Finish DMW Ceilings		11/1 Apr-13	20 Apr-13	10	Hang & Finish DMW Ceilings												
MEP Installation/Work																		
SP203	Install Utilities along O Street west of Intersection		10/17 Dec-12	20 Mar-13	10	Install Utilities along O Street west of Intersection												
SP204	Install Reinforced Concrete & Pre-File at Loading Dock		10/17 Dec-12	20 Mar-13	10	Install Reinforced Concrete & Pre-File at Loading Dock												
MEP Installation/Work																		
SP205	Install Conduit & Rough-in for Signification		5/10 Apr-13	10 Apr-13	10	Install Conduit & Rough-in for Signification												
SP206	Prepare Subgrade & Post-Install		5/10 Apr-13	10 Apr-13	10	Prepare Subgrade & Post-Install												
MEP Installation/Work																		
SP207	Install Site Wall Footings		5/10 Apr-13	10 Apr-13	10	Install Site Wall Footings												
SP208	Construct Transformer Enclosure Walls		5/10 Apr-13	10 Apr-13	10	Construct Transformer Enclosure Walls												
SP209	Construct Concrete Retaining Wall		10/1 Apr-13	10 Apr-13	10	Construct Concrete Retaining Wall												
SP210	Construct CMU Site Wall & Install Brick Veneer		5/10 Apr-13	10 Apr-13	10	Construct CMU Site Wall & Install Brick Veneer												

# Managing the Schedule in the Field

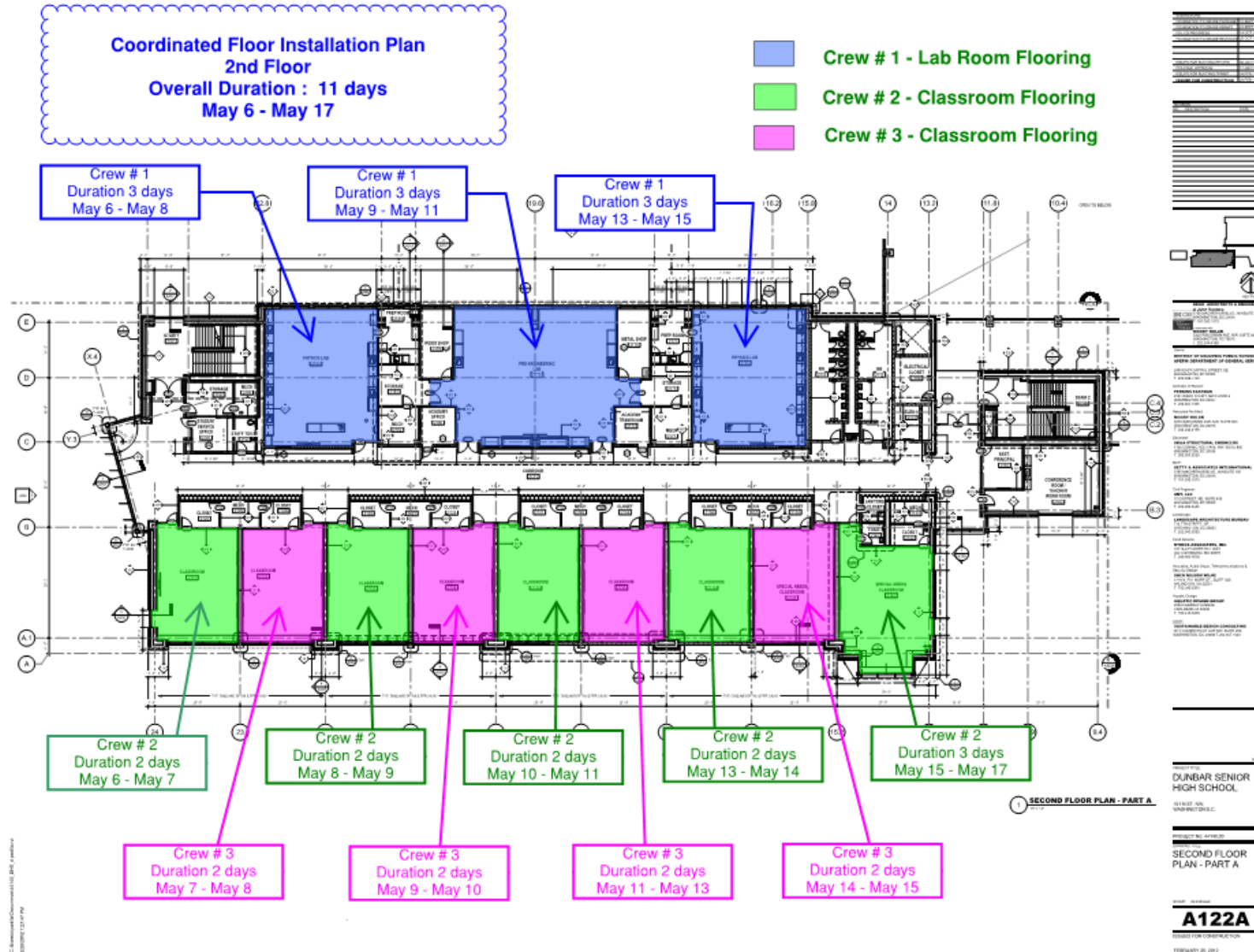
- Trade Kick-Off Meeting – “very informal”
- Tracking Current Progress – “visit the site & walk with the Superintendent”
- Digging into the Details of the Work to plan:
  - Total duration of the activity
  - The plan of attack on “how” the subcontractor will achieve the durations
  - Work with the other trades to develop the “right” plan that will allow everyone to be productive with the right flow of work
  - Plan the Work, Work the Plan. (see the next slide)



# Weekly Work Plan



# Digging into the Details



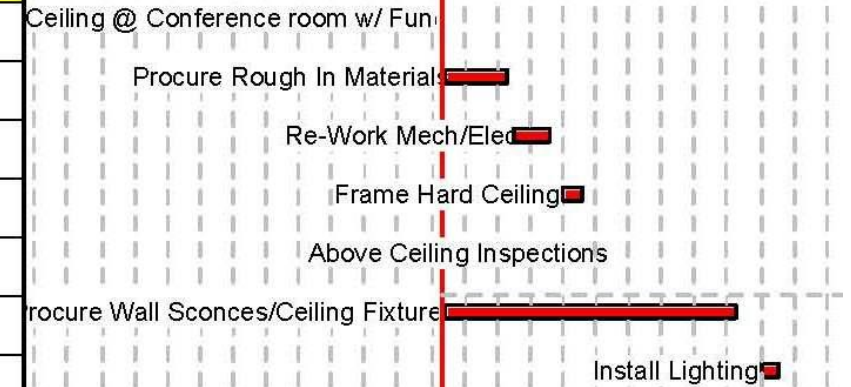
# Managing Potential Conflicts

- Scheduling conflicts occur on ALL projects. The initial base line schedule, monthly update schedules, and “Pull Plans” will not catch every possible scenario. We all work in construction, ...and we all recognize this.
- The successful contractors are the ones who “get involved” in determining the best solution for everyone. That begins with:
  1. Remaining positive to work together to figure out the best solution for everyone.
  2. Be vocal...you’re in business for a reason. We value your ideas and “What if” scenarios. 99% of the time...those ideas are the ones that work !!



# Managing Change Orders

Act ID	Description	Orig Dur	Rem Dur	Early Start	Early Finish	2013																											
						FEB				MAR				APR				MAY				JUN				JUL							
						04	11	18	25	04	11	18	25	01	08	15	22	29	06	13	20	27	03	10	17	24	01	08	15	22			
2nd Floor																																	
Change from Drop Ceilings to DW Ceilings																																	
CO-10	NTP for Hard Ceiling @ Conference room w/ Funds	1d	1d	01MAY13	01MAY13	Ceiling @ Conference room w/ Funds																											
CO-20	Procure Rough In Materials	10d	10d	02MAY13	15MAY13	Procure Rough In Materials																											
CO-30	Re-Work Mech/Elec	7d	7d	16MAY13	24MAY13	Re-Work Mech/Elec																											
CO-40	Frame Hard Ceiling	5d	5d	27MAY13	31MAY13	Frame Hard Ceiling																											
CO-45	Above Ceiling Inspections	1d	1d	03JUN13	03JUN13	Above Ceiling Inspections																											
CO-50	Procure Wall Sconces/Ceiling Fixtures	45d	45d	02MAY13	03JUL13	Procure Wall Sconces/Ceiling Fixtures																											
CO-60	Install Lighting	5d	5d	08JUL13	12JUL13	Install Lighting																											



# Key Take Aways

1. Know your scope of work and your contract
2. Make sure there is an accurate MESR (procurement schedule for key items)
3. Have a clear understanding of other scopes as it relates to yours...and ask questions about it.
4. Be proactive: Get engaged PRIOR to your scope of work commencing
5. Take the time to walk the project ahead of your start date
6. Walk with the superintendent
7. Be able to explain “how” to our subcontractors
8. Take the time to “understand” the flow of work between trades
9. Be positive!

# Questions

