

January 27, 2022, 7:45 AM - 3:30 PM Online

# 8<sup>th</sup> Annual Project Controls Summit Program

**SUMMIT focus** is helping owners and key design, engineering and construction professionals gain a better understanding of important issues and principles that influence their ability to effectively and successfully meet their project, financial, and organizational goals.

- The Virtual Summit Agenda provides some transition time between presentations, to allow for Speaker set up, announcements, Introductions reading speaker bios, and technical instructions.
- Morning and afternoon breaks, and lunchtime (45 min.) are Included.
- Speakers will indicate how they plan to handle questions or feedback.
- Please leave your **microphone muted** unless asked to activate it. Thank you!
- If you have not already, **print this program** for reference throughout the day.
- **Also print the Feedback Form** to note your responses throughout the day.

**Enjoy the SUMMIT!**

## AGENDA

**7:45 AM** Check into Zoom, Slide Show

**7:52 AM** Welcome, IT Directions, Thank yous, Introductions

**8:02 AM** Transition and Introduction

**8:05 AM** **California Construction Forecast 2022**



### **Natalie Saylor**

Founder and Principal  
Saylor Consulting Group

Ms. Saylor heads the construction economic research division of Saylor Consulting, which analyzes and compiles data on construction spending, employment, bidding trends, and other economic indicators that impact construction cost.

Saylor Consulting Group is a full-service construction cost consulting firm specializing in public construction. It is currently providing professional services on some of the largest projects in San Francisco, including San Francisco General Hospital, San Francisco ESER Bond Program, San Francisco SFPUC New Biosolids Digester, and SFO Terminal 1 Redevelopment Program.

**Thank you to our Summit Program Sponsor:**



**8:35 AM** Transition and Introduction

**8:38AM** **LA Metro - Technical, Financial & Legal Lessons Learned on Capital Projects**



**Julie Owen**

Senior Executive Officer, Project Management Oversight  
Program Management Department  
Los Angeles Metro

Julie is an industry thought leader with more than 30 years of experience in project controls, managing programs, and delivering capital projects. She is a senior leader with proven ability to lead teams and deliver program and projects on-time and within budget. She is helping manage the \$160 billion over 50-year capital program to improve Los Angeles County transportation infrastructure. She is a Distinguished International Fellow of the International Cost Engineering Council, Fellow of the Guild of Project Controls and AACE International Fellow.

**9:08 AM** Transition and Introduction

**9:11 AM** **Quantifying Labor Productivity Loss**



**Megan Wells**

Managing Director  
Ankura

Megan has 25+ years of experience in forensic accounting, primarily in construction cost and claims auditing. Her contemporaneous and post-contract completion work includes: verifying payment applications; calculating or verifying change order cost proposals; calculating daily jobsite or home office overhead rates; reviewing bid to budget reconciliations; calculating project cost overruns; analyzing labor productivity claims; determining contractual compliance of billed project costs; analyzing overhead and profit mark-up components; and analyzing termination cost accounting calculations. Megan has provided written and oral testimony in court and arbitration.



**Josh Chittick**

Senior Associate  
Ankura

Mr. Chittick is a consultant experienced in helping clients analyze construction schedule delays, cost overruns, losses of productivity, and other project issues in support of disputes and litigation on capital projects. His expertise is quantification of damages, and he has worked on projects in the U.S. and internationally. He is a member of the Association for the Advancement of Cost Engineering International (AACE) and is it's San Francisco Chapter Treasurer.

**9:56 AM** **BREAK** (10 Minutes)

***Please return to the program on time.***

**10:06 AM** Transition and Introduction

## 10:10 AM Plan, Budget, Automate: The Power of Visualizing Data



### Keanu Daley

Data Analyst  
Currie & Brown

Keanu is a recent graduate of the University of St. Thomas with degrees in Actuarial Science, Statistics, and Theology. He analyzes data for market intelligence and is responsible for gathering data on labor and material within the Americas. Based in Minneapolis, Minnesota, Keanu is one of Currie & Brown's Power BI experts.



### Katrina Petchey

Assistant Cost Manager  
Currie & Brown

Katrina is a recent graduate of Portland State University with a Bachelor of Science degree in Business Management and Leadership. She is based in Portland, Oregon and supports our tech real estate team with cost management, data visualization and sustainability consulting.

## 10:40 AM Transition and Introduction

## 10:43 AM Developing and Messaging Culture for Project Success



### Michael J. Meredith,


DBIA, LEED  
Capital Outlay Program  
Manager  
California Department of  
General Services

Mike oversees California's 10-year \$3 Billion 4.9 million SF Sequencing Plan addressing facilities deficiencies. He has nearly 40 years of experience in public and private construction, including high rise office, prisons, and government projects, including the \$906M dollar California Health Care Facility, a 1.2M sf prison healthcare facility; and \$392M 1.1mil sf Capitol Area East End Complex in Sacramento. Mike has participated in \$2.5B+ worth of Design-Build projects and been active in DBIA for several years, currently serving as Western Pacific Region's Owners Council Director.


11:13 AM Pre-lunch Instructions

11:15 AM LUNCH BREAK (45 Minutes)

**Please return by noon.**



## Adding value to physical assets the world over



- Program and project management
- Cost management
- Project controls
- Estimating
- Scheduling
- Procurement
- Claims advisory
- Data analytics
- Construction business intelligence
- Loan monitoring
- Invoice auditing

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**12:00 PM** Post-Lunch Instructions, Agenda Review & Intro

**12:10 PM Identifying, Quantifying, and Mitigating Schedule Delays and Disruptions**



**Roger Nelson**, PE, PSP, LEED AP

Managing Consultant  
Spire Consulting Group

Mr. Nelson specializes in resolving construction-related disputes for complex projects, including: government facilities; infrastructure; light-rail; electrical and gas transmission; industrial facilities; high-rise buildings; and multi-family residential buildings. Roger delivers construction and program management services by performing contract risk analysis, changed work analysis, schedule oversight, and cost management throughout the lifecycle of a project. He also provides forensic services by analyzing, developing, and preparing claim evaluations, and supports clients in mediation, arbitration, and litigation.

**1:00 PM** Transition and Introduction

**1:03 PM Project Controls and Management Through CAFM**



**Jagan Singh** MBA, PMP, LEED BD+C

Principal Manager of Project Management  
Facilities Services, Administrative Division  
Judicial Council of California

Jagan joined the Judicial Council of California in 2015. He is responsible for both the capital construction program and facility modification program. A licensed architect, Jagan earned his MBA from UCLA Anderson School of Management. He has over 25 years of experience in project design, construction, and management. He has been actively involved in setting up processes and controls for Capital Outlay Improvements and Facility Modifications. He has led the Council's efforts to changeover to the Design Build method of project delivery.

**1:33 PM BREAK** (10 Minutes)

*Please return to the program on time.*

**1:43 PM** Transition and Introduction

**1:46 PM Mistakes Owners Must Avoid to Reduce Claims & Disputes**



**James G. Zack, Jr.** CCM, CFCC, ECCCS, ECCDA, PMP, FAACE, FGPC, FRICS, FSCCI  
Principal, James Zack Consulting, LLC

For 50 years, Jim has helped public and private owners and contractors in the U.S. and 39 countries with 5000+ claims, focused on helping them complete projects in the field, not in arbitration or court. He has held senior positions with Ankura Construction Forum™, Navigant Construction Forum™, Fluor Corporation, PinnacleOne, and CH2M HILL, Inc. He is a Fellow of AACE, RICS, GPC, and SCCSI, and a recognized, published expert in mitigation, analysis, and resolution or defense of construction claims and disputes.

**2:36 PM** Transition and Introduction



### John Moehnke

Director, IT  
Engineering Software Solutions, LLC

Engineering Software Solutions aspires to be the leading project and program information and knowledge management software provider. Its products help clients deliver large-scale projects cost-effectively and efficiently. As Director of IT, John oversees business operations and all technical development of the PIMS Software portfolio. He has 30+ years experience helping clients leverage software and technology to achieve better business outcomes, and has almost 20 years working in the pharmaceutical project management space. Mr. Moehnke holds a Mathematics degree from Trinity University and an MBA from Southern Methodist University.

## ANNOUNCEMENTS

- Thank you to our Program Sponsor - Currie & Brown
- Complete Summit **Feedback Forms** (include additional questions for the speakers - please send to Valerie by Friday: [vann@wccc.org](mailto:vann@wccc.org))
- Make the most of **Membership** - renew, come back, join.
- **Sponsor** live and online programs.
- **Host** Round Tables or other programs.
- Request program topics
- The Council's **New Website** - <https://westerncouncil.org> — *Explore it!*
- Online **Academies** are adding content regularly — join & learn.
- Lorman Education programs discount for WCCC
- Mark and plan your Calendar - **See the next page for some options ...**

# SAVE THESE DATES

## Western Council Webinars Calendar 2022 (Updated 1/20/2022)

Type	Title	Date	Time (PT)	Presenter(s)
Claims Series	Time Extension Requests – What Must A Contractor Prove?	2/3/2022	8-10 AM	James Zack
Scheduling Series	Early Completion Schedules - Benefits, Risks & Defenses	2/17/2022	8-10 AM	James Zack
Claims Series	Pricing Delay Costs - How Owners Deal with Home Office & Jobsite Over-head Costs	3/10/2022	8-10 AM	James Zack
Scheduling Series	Concurrent Delay - Is This Still a Contractor's "Get Out of Jail Free Card"?	3/17/2022	8-10 AM	James Zack
Claims Series	Impact Damages - Fact or Fiction?	3/29/2022	8-10 AM	James Zack
APD Series	Alternative Project Delivery Series - Synergy vs Individual Expertise	4/7/2022	9:30-11 AM	Brian Lines & Jeff Sawyer
Claims Series	Mediating Construction Disputes - A Way To Avoid Arbitration & Litigation	4/14/2022	8-10 AM	James Zack
Legal Series	Critical Keys to Avoiding and Resolving Claims in Differing Site Conditions and Underground Infrastructure Projects	TBA	TBA	Mark Stapke
Claims Series	Alternative Dispute Resolution - Your Key to Avoiding Court	4/28/2022	8-10 AM	James Zack
APD Series	Alternative Project Delivery Series - Creating More Collaborative Partnerships in Alternative Delivery	5/3/2022	9:30-11 AM	Brian Lines & Jeff Sawyer
APD Series	Alternative Project Delivery Series - Owner Readiness for Alternative Delivery – Ready to Make the Transition?	6/2/2022	9:30-11 AM	Brian Lines & Jeff Sawyer
Viewpoints Series	Project Partnering – A Way To Reduce Claims & Disputes	6/9/2022	8-10 AM	James Zack
Viewpoints Series	Suspend Work – “Remain on Standby” – 3 Key Words	6/16/2022	8-10 AM	James Zack
Viewpoints Series	Schedule Delay Analysis – Choosing A Method & Why Results Differ	7/14/2022	8-10 AM	James Zack
Viewpoints Series	Impact of Rework on Construction Projects	7/21/2022	8-10 AM	James Zack
Viewpoints Series	Pacing Delay – The Practical Effect on Construction Projects & Delay Claims	8/11/2022	8-10 AM	James Zack
Viewpoints Series	Differing Site Conditions – Whose Risk Is It?	8/18/2022	8-10 AM	James Zack

*Currently planning more programs through the end of the year*



**March 19, 2022 7:45 AM - 3:30 PM (PT) Online**

**Request Topics & Speakers / SPONSOR**



**Plan to attend the  
9th Annual Project Controls SUMMIT  
in late January 2023**

**3:30 PM Adjourn**