

# ALASKAN WAY CONSTRUCTION STRATEGIES WORKSHOP

Monday March 9<sup>th</sup> –Wednesday March 11<sup>th</sup> · Alaskan Way Offices

## Workshop Objectives:

Given the nature of the program, considering schedule and budget goals, Panel members will identify, evaluate and recommend delivery strategies to meet these goals, considering:

- Alternatives for project delivery and contracting methods.
- Scope, size and complexity of potential contract packages
- Risk identification and risk management strategies
- Other strategies and actions that will be necessary to meet program goals.

The workshop will review all relevant contracting and packaging strategies, consider pros & cons and recommend the range of alternatives for further consideration or evaluation.

## ATTENDEES<sup>2</sup>

Group 1 (essentially full time depending on other obligations):

WSDOT: Alec Williamson, Bob Dyer  
PMAC: John Townsend, Alastair Biggart, Don Phelps (with Alec Williamson)  
PB: Tom Peyton, Joe O’Carroll (as needed for risk)  
Sound Transit: Dick Sage (Day 1, other time as requested by Chair, report out Day 3)

Group 2 (part time as scheduled or needed - see assignments in agenda following)

Dave Dye, Jerry Lenzi, Craig Stone, Ron Paananen, John White, Dan Galvin  
Linea Laird, Matt Preedy, Theresa Greco, Rick Smith  
John Reilly, Harvey Parker, Red Robinson.  
Harry Jarnagan, Vic Oblas, Chris Ludington, Mike Morrison  
Mike Rigsby, Rick Conte, Gordon Clark

## INDUSTRY PANEL (full time)

Name	Expertise, inputs
1. Brenda Bohlke	CHAIR. Geological, Tunnels, Management, Current UCA President, SR520 Tunnel Panel member
2. Jan Keiser	Engineer, Attorney, former Construction Counsel for Sound Transit, SR520 Panel member (contracting)
3. Ed Plotkin	Former Engineer, Contractor, Owner – consulting on underground construction & contracting, NY, Toronto
4. Jo Bhore	Extensive construction experience across US; presently consultant on SF Central Subway for Construction Strategies and DRB in New York
5. Walter Mergelsberg	Former Director of Construction, Washington Metro system (26 years) now with Dr-Sauer Corporation
6. Otto Braach	Former Hochief + Weiss and Freitag chief tunnel engineer, TBM Expert, Consultant to Lake Mead tunnel project
7. Gianni Arrigoni	Extensive construction + international tunneling experience, author re contracting and delivery (See Annex, Mechanized Tunneling Book)

- 1 Some issues may continue to be worked the following days, if and as necessary, consistent with travel arrangements and who is available
- 2 It is expected that project personnel will be working on their areas of responsibility, as appropriate, when not required to be at the workshop

## DETAILED AGENDA

**DAY #1** – Monday, March 9, 2009 – 8:30 am (gathering) to 6 pm (Closing)

**Project Overview/Experience/Context/Objectives/Key issues/Identify Alternatives**

23 fl Training room (morning), 32<sup>nd</sup> Floor conference area (afternoon)

Time	Topic	Presenting/who	In attendance
8:30	<b>Welcome and introductions</b> <ul style="list-style-type: none"> <li>• Introductions</li> <li>• Review workshop objectives</li> <li>• Agenda overview – adjustments and modifications</li> </ul>	Paananen / Dye Panel White + Bohlke Bohlke	Groups 1 & 2
9:00	<b>Project overview &amp; understanding</b> <ul style="list-style-type: none"> <li>• Project background, Tunnel Decision</li> <li>• Project Organization - Review</li> <li>• Project Configuration, Interrelationships</li> <li>• Environmental process, Record-of-Decision</li> <li>• Alignment alternatives, affected facilities</li> <li>• Fire Life Safety, Ventilation</li> <li>• Geologic-hydrology</li> <li>• Proposed project schedule &amp; cost</li> <li>• Construction Logic related to schedule &amp; cost</li> </ul>	Paananen White Preedy Greco Williamson Clark Robinson Williamson + Morrison Vic Oblas	Groups 1 & 2
12:00	<b>Working Lunch:</b> <i>Seattle TBM Tunneling History</i>	Parker	White, Preedy, Greco, Reilly
12:30	<b>Project Site tour, questions, discussion</b>	Panel + Guides (Preedy, Rigsby, Williamson)	
2:15	<b>WSDOT Contracting / previous recommendations</b> History, recent experience, achievements Methods used / considered, A+B, Value determination, Bonding/Insurance/Alternative Delivery, recent Design-Build experience SR520 panel recommendations	Linea Laird Bob Dyer John Reilly	Group 1
3:00	<b>Panelist Presentations: Lesson Learned &amp; issues related to this task</b> (approximately 20 mins each) Washington DC Metro tunnels - lessons learned Toronto and New York – lessons learned TBM applications, related to contract strategies SF Central Subway construction strategies Sound Transit procurement experience: International contracting and delivery - overview Washington State - contracting possibilities	Mergelsberg Plotkin Braach Bhore Sage Arrigoni Keiser	Group 1 +  White, Greco, Preedy, Reilly, Parker, Oblas, Rigsby
5:00	<b>Break &amp; Discussion</b>		
5:15	<b>Panel Discussion: alternatives to be considered:</b> Pros & cons, key issues, initially preferred alternatives, gaps, data required (action items)	Panel	Group 1 <sup>3</sup>
6:00	<b>Adjourn</b>		

<sup>3</sup> Depending on Panel's need for input – to be determined by Chair.

**DAY 2** –Tuesday March 10, 2009

**Develop and characterize alternatives, compare to objectives, identify issues affecting construction strategies (Panel with specific persons attending or called as necessary)**

<b>Time</b>	<b>Topic</b>	<b>Presenting/who</b>	<b>In attendance</b>
8:00	<ul style="list-style-type: none"> <li>• Re—Cap Day 1</li> <li>• Agenda review – adjustments and modifications</li> </ul>	Bohlke	White, Preedy, Greco, Reilly
9:30	<p><b>Evaluate Issues Affecting Construction &amp; Contracting Strategies, Packaging, Sequence</b></p> <ul style="list-style-type: none"> <li>• Key risks, Risk Management Strategies</li> <li>• Cost Estimating/Project Budgeting/Cashflow</li> <li>• Project Schedule: Critical Milestones</li> <li>• TBM manufacture, delivery, setup, tunneling</li> <li>• Portal construction, key issues, opportunities</li> <li>• Site characteristics, adjacent structures, access points, construction logistics</li> <li>• Industry Capacity/Competition/Participation</li> <li>• Other considerations: Contract interface nodes</li> <li>• Summary and afternoon agenda</li> </ul>	Panel	Group 1 +  Project staff as needed and called for depending on the topic
12:00	<b>Working Lunch &amp; Discussion</b>	Panel	White, Preedy, Greco, Reilly
12:30	<p><b>Identify Preferred Project Delivery Alternatives for consideration in this workshop</b> Identify Fatal Flaws or Constraints or Institutional Barriers/EIS process and schedule</p>	Panel	Group 1 +  Project staff as needed and called for depending on the topic
1:15	<p><b>Evaluation of Contracting &amp; Delivery Alternatives and related issues</b></p> <ul style="list-style-type: none"> <li>• TBM Procurement Strategies/requirements</li> <li>• Tunnel construction, internal facility, systems installation, site logistics, schedule compression</li> <li>• Bid Process: Early Contractor Involvement; Competition; Capacity, Bonding, Insurance</li> <li>• Partnering &amp; collaborative processes; Risk Management / Risk Allocation Incentives (pain-gain)/</li> <li>• Outline Contract Packages + Bid and Selection Processes related to above</li> </ul>	Panel	Group 1 +  Project staff as needed and called for depending on the topic
3:15	<b>Break</b>		
3:30	<b>Identify &amp; narrow</b> recommendation set for further consideration	Panel	
5:30	<p><b>Review Day 2 and Plan for Day 3</b> –Draft Outline for Report, discussion, actions req'd</p>	Panel	
6:00	<b>Adjourn</b>		

**DAY 3- Wednesday March 11, 2009**

**Recommendations and Reporting**

<b>Time</b>	<b>Topic</b>	<b>Presenting/who</b>	<b>In attendance</b>
8:00	<b>Recap Day 1 and 2 –considerations for Day 3</b> <ul style="list-style-type: none"> <li>• Agenda review – adjustments and modifications</li> </ul>	Bohlke, Panel	White, Preedy, Greco, Reilly
8:30	<b>Review Project Organization and implementation planning</b> - with respect to potential or recommended Project Delivery Strategies	Panel	White, Preedy, Greco, Reilly
9:30	<b>Discuss and agree on</b> contracting strategies to be addressed in report. <ul style="list-style-type: none"> <li>• Discuss / outline of report (v.1) with recommendations</li> <li>• ID key issues and concerns, opportunities, specifics of contracting strategies, considerations and cautions</li> <li>• Develop recommendations finalize key issues, barriers, implementation</li> </ul>	Panel	Group 1 +  Project staff as needed and called for depending on the topic
12:00	<b>Working Lunch &amp; Discussion</b>	Panel	White, Preedy, Greco, Reilly
12:30	<b>Continue to detail recommendations with</b> <ul style="list-style-type: none"> <li>• Outline Report (v.2)</li> <li>• Elements of report, outcomes and actions required</li> <li>• Preparation for the Report out/Briefing</li> </ul>	Panel	Group 1 +  Project staff as needed and called for depending on the topic
2:30	<ul style="list-style-type: none"> <li>• Report out / Briefing to WSDOT Exec and Staff:</li> <li>• Review workshop deliberations, contracting strategies, recommendations and report content</li> <li>• Questions &amp; discussion</li> </ul>	Panel	Group 1 + Group 2
4:30	<ul style="list-style-type: none"> <li>• Next Steps</li> <li>• Assignments for completion of report</li> <li>• Schedule for completion, production requirements</li> <li>• Other considerations to be communicated to the project</li> </ul>	Panel  (could be smaller group)	White, Preedy, Greco, Reilly
5:00+	<ul style="list-style-type: none"> <li>• Adjourn</li> </ul>		

**Note**, on Thursday Panel members who are available will present technical details and considerations in their specialty to the Project Team, with discussion related to the project. An informal lunch presentation, with questions and discussion is planned as a “brown-bag” lunch for interested staff.