|  |  |
| --- | --- |
| **First & Last Name** |  |
| **Company Name** |  |
| **Title** |  |
| **Office Phone** |  |
| **Cell Phone** |  |
| **Email** |  |

**Instructions:**

This year we are adding a new category, Portfolio/Program Excellence. Please use this submission form for this category, there are slight variations in the submission form.

Please complete the submission request form as completely as possible. It is recognized that not all projects will collect all the data. We will do our best to evaluate projects completely, however if data is not submitted it may result in that section not receiving scoring credit.

Items in *red italic* above are intended for instructions or assistances and should be deleted from the form to make room for your submission.

Please provide a contact point person(s) for submission questions and follow up. Include both email and phone numbers for this person(s). This can be included on separate paper or in cover email.

CURT and/or CLMA staff may request follow-up interviews to clarify information to be included in the confidential database.

Confidentiality is of primary importance. We will provide a list of judges prior to releasing your data to the judging panel. If for business reasons you would like to request one or more particular judges not participate in evaluating your project, CURT will not release your data to that panel judge. If <60% acceptable judges remain, your submission can not be considered.

Project owner approval will be obtained before publishing any project specific summaries of award winners.

If you have any questions related to this process, please contact…

**CURT Project Excellence Award Lead**

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| --- |
| Rob Wagner, Co-Chairmanwagner.re@pg.com(513) 200-4269 |

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| Basic Project information

|  |  |  |  |
| --- | --- | --- | --- |
| Portfolio Name: |  | Contracting Method:  | *DB, IFOA (3 party, Multiple Party), T&M, Strategic Contract, Other* |
| Portfolio Location: |  | Compensation Method:  | *GMP, Reimbursable, Lump Sum, Other* |
| Total Installed Cost (Actual): | *Actual TIC* | Portfolio Type:  | *i.e. Brownfield, Greenfield, Retro, tenant improve…* |
| Total Direct Cost (Actual): |  | Industrial Category*:*  | *i.e. manufacturing, PetroChem, Pharma,…* |
| Portfolio Evaluation Period | *i.e. Jan 2021 – Jan 2022, FY21/22* | Primary Contact: |  |
| Number of projects  |  | Owner Name: |  |
|  |  |  | Designer(AE): |  |
|  |  |  | Constructor (CM/Primary GC): |  |
|  |  | Others, Key Contributors:  |  |

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| **Portfolio Description Narrative:***Please provide a brief description of the portfolio ~250 words* |
| **Portfolio Safety Performance:***Provide a safety summary of portfolio performance.* ***If applicable describe how safety program was innovative.*** *<250 words*Labor and Safety Statistics

|  |  |  |  |
| --- | --- | --- | --- |
| Total man Hrs:  | LTIR: | RIR: | Safety Observation Records: total # |
| Craft Labor Hrs: | DART: | Near Miss Incidents: Total # | First Aid incidents: total # |

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| **Portfolio Schedule Performance:***Provide a description of the portfolios overall schedule management philosophy. Clarify any particular schedule challenges.* *If applicable describe how/what schedule value was achieved and/or innovative. Discuss any tools used to manage schedule <250 words*Total Schedule Performance Measures*Describe the individual project schedule performance within the portfolio. What percentage is on schedule, ahead, delivered late?* |
| **Portfolio Cost/Budget Performance:***Brief description of portfolio budget. If applicable describe how/what budgetary value was achieved and/or innovative. If available a budget profile vs time can be included. Note if budget savings were reinvested in additional scope or added value to the owner.<250 words*Total Cost Performance Measures

|  |  |
| --- | --- |
| Budget *Estimated TIC @ final approval* | Total Soft Cost: $ Management, Commissioning and Design  |

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| **Portfolio Quality Performance:***Provide a summary of portfolio quality performance. If applicable describe how quality program was innovative.<250 words*Portfolio Quality metrics:

|  |  |  |
| --- | --- | --- |
| Design Quality: # clarifying RFI’s after IFC | Construction Quality: Rework: *$ rework* | Punchlist: *(# of punchlist items @ completion* |

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| **Portfolio Innovation/Value Add/Tools:***Provide brief description of how portfolio was innovative and added value. How did the assembled team meet the challenge of a difficult job, use innovation and construction techniques or materials, craftsmanship, or management tools to improve overall portfolio value or delivery? <250 words***Other Metrics: (Where Applicable) These items are not required but will help tell the story of innovation**

|  |  |
| --- | --- |
| **Prefabrication: $ fabricated off site/ $(TIC)=** | **Interruptions: # ITO’s=** |
| **Change: # Change orders=** | **Change: Final Value vs Award Value: (Award $ – Actual $)/ Award $=**  |
| **Change: $ Change Order=**  | **TIC/ft2:** |

 |

**Definitions**

**Total Installed Cost (TIC):** Total portfolio cost including all design, management, commissioning, qualifications, equipment and installation labor for a given scope of work. Includes both on-site and off-site cost. Total Direct Cost + Indirect Cost.

**Total Direct Cost:** Also called Cost of Work (COW). All cost directly associated with creation of assets. This includes both on-site and off-site prefabrication.

**Indirect Cost:** Sometimes synonymous with Soft cost, the cost associated with designing, procuring, managing the installation, commissioning qualifying the functions of the assets. These costs are independent of the source of supply. Cost that directly contribute to an asset creation are not indirect cost. These include foreman, superintendents, authors of code that is in itself an asset. These costs are broken into 6 categories. Design (feasibility/programing, all design elements/phases, services during construction), General Contractor (Construction Management Staff, CM Fee/profit, General Conditions, Contractor contingency, Site services, construction utilities), Trade contractor (Trade Staff, Trade General Conditions, Trade contingency, Trade office overhead, Trade profit), Owner (Owner headcount cost), 3rd party (Contingent Worker [CW] support services, CW Commissioning, CW Inspection and testing), other (Taxes, Insurance, Permits).

**Schedule Change(Predictability):** The ratio of schedule variation to predicted duration. (Actual Duration – Planned Duration)/Planned Duration

**Errors/Omissions/As Found Conditions Costs:** Cost associated with rework and or corrections due to an error in design or communication of design or omission of information in the design, procurement or management of installation. As-found conditions are additional cost associated with addressing as found items in the field that could have been reasonably discoverable by the portfolio team prior to or as part of the design process.

**DART: Days Away, Restricted, Transferred:** A standardized lagging safety performance metric based on total number of days away, restricted, or transferred per 200,000 work hours.

**LTIR: Lost Time Incident Rate:** A standardized lagging safety performance metric based on total # of lost time incidents per 200,000 work hours.

**RIR: Recordable Incident Rate:** A standardized lagging safety performance metric based on total # of recordable incidents per 200,000 work hours.

**First Aid Incidents:** Total number First aid incidents assigned to the portfolio.

**Near Miss Incidents:** Total number of Near Miss incidents assigned to the portfolio.

**SOR:** total number of safety observation reports made by both craft and management normalized to 1000 work hours. This rate is a measure of participation and engagement in safety program and is considered leading indicator.

**Clarifying RFI:** A formal request for information that is intended to request clarification of design intent or an informal request for information that results in a document change or issuance of a formal clarification or change notice after the design has been issued for construction. A single change can impact a single drawing or multiple drawings, however each change to a drawing(s) even with a single drawing issuance should be counted as a separate Clarifying RFI. (i.e. PSV size change and unrelated pump change are 2 changes but pipe size change and accompanying pump and valve changes are a single change) Issuance of changes due to owners request should be considered clarifying RFI’s unless the owners change is due to a new or developing business need and is an agreed to change in direction from the owner’s original intent. Issuance of an RFI to document concurrence with an action or purchase or concept development, i.e. development RFI’s or submittals should not be considered a clarifying RFI.

**Rework:** Total dollars spent to address erroneous, substandard or incomplete work after the assignment is reported as done and/or cost associated with removal and reinstallation of work already in place in order to facilitate other work to be done. Also called out of sequence work or interference or clashes. Also included in rework is cost associated to address clarifying RFI’s or restock or reorder material.

**Punch-List:** Also called Work to go list or defects, this is # of items requiring attention before being accepted. While it is recognized that punch-lists are used to track both items that need to be revisited and items that have not been started or finished. The intent of this is to measure the number of items on the list at the time the team considers the portfolio substantially complete.

**Prefabrication:** It is recognized that work completed in a controlled environment more closely approaches a manufacturing setting and is easier to increase the quality of work product while ensuring safe and efficient work while controlling cost. With additional benefits of parallel work fronts prefabrication can improve efficiency. This measure is intended to quantify prefabrication rate by comparing the $ spent on material prefabricated to total installed cost of the project.

**Change:** While changes in themselves are not always bad, rate of and amount of change are indicators of lost opportunities and lack of collaboration. A change is defined as a deviation from a direction agreed to through contract, scope of work or design document. Each instance of a change in direction should be counted in # of changes, where $ change order is the total additional money spent or saved to enact the change. Planned releases of contracts moneys or specific direction of allowance allocation should not be considered changes unless the budgeted amounts are insufficient to cover specified instructions.

**Total Person Hours:** All hours required to execute a project including design construction management, field construction, commissioning and qualification. This includes both onsite and compensated off site hours for staff. This does not include prefabrication hours for off-site activities.

**Construction Labor Hours:** This includes all onsite labor required to fabricate, install and commission new capital assets. This does not include off site prefabrication by contractor or vendors of finished equipment.

**Interruptions to Operations ITO’s:** Unplanned or unscheduled interruptions to the owner’s business function. Examples include evacuations, power outages, utility disruptions, reportable spills, or other events that require non-project personnel investigation or intervention.

**Awarded Value:**  Total value of contracted services at the time of award plus any planned additions awarded later (deferred awards). Total Awarded value is the sum of all awarded values for a project.

**Final Value:** Total dollars spend for a specific contract(s) this includes all changes and is reflective of actual cost paid to the provider. Final value is sum of all contract awarded and associated changes for a project.

**Estimated Value:** Total dollars estimated for a service at the time of award. This does not include scope additions unless the scope addition is agreed to be included by all parties. In this case the scope addition cost should be reflected appropriately in other calculations.