



FIRM OVERVIEW CAPABILITY STATEMENT

What We Do

P&M offers specialized and value-added integrated project delivery services, project management and program controls services. Clients include owners, architects, engineers, and construction contractors. Our staff bring extensive background as a general contractor with expertise in alternative as well as traditional design-bid-build project delivery.

P&M has the capacity and expertise to successfully manage complex capital improvement programs drawing from P&M's decades of collective experience managing projects. P&M's consultants are all seasoned professionals with real-world program management and construction management experience, who are skilled in working with all levels of a projects PM/CM organization, proactively leading and implementing project management and controls services to achieve successful and optimal project outcomes.

Professional Services:

- Project Management
- Cost estimating (conceptual through detailed)
- Planning, scheduling, and constructability reviews
- Risk workshop facilitations, risk assessments and stochastic analysis including contingency and management reserve analysis
- Cost management
- Earned value management
- Claims analysis and change management
- Document controls, coordination and project administration
- Project review & assessment

Differentiators

- P&M consultants draw from multiple market sectors experience enabling application of industry best practices benefiting project delivery.
- Extensive real-world implementation of project risk identification, risk mitigation and project life cycle risk management.
- Integration of risk management into project planning and controls processes.
- Provide integrated program controls and management teams and systems to achieve customer stated project goals and to provide unique project solutions.
- Accurate forecasting of Key Performance Indicators (KPI's) utilizing proprietary program management and trending databases in support of informed and timely decision making.
- Extensive experience working with owners' project management platforms and augmenting with P&M specialized expertise and technology to provide optimal, flexible, and scalable solutions.
- Fostering collaborative relationships by listening and learning about client needs and performing with utmost character and ethics. P&M staff keep this at the forefront of their performance as they conduct business with all stakeholders.
- Excellent knowledge base and certifications in industry best practices such as Project Management Institute (PMI), Association for the Advancement of Cost Engineering (AACEI), American Society of Professional Estimators (ASPE) and Association for Information and Image Management (AIIM).

PLANNING & MANAGEMENT SERVICES, INC.

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Representative Projects & Sectors



Sound Transit - Risk Engineering Program Management

P&M is providing Sound Transit Risk Engineering Program Management to produce and manage the risk program for all projects that are part of the Sound Transit 2 and Sound Transit 3 programs which includes:

- Conduct independent quantitative risk assessments (including FTA top-down assessments) for all ST-2 & ST-3 projects, for planning, design and construction phases, to evaluate project schedule and cost contingencies.
- Oversee the development and maintenance of project specific /program wide risk registers, facilitate risk workshops and risk mitigation plans with project team members.
- Drafting comprehensive reports of risk assessments for client leadership and FTA partners.
- Utilize the risk register to monitor the identification and assessment of risks as well as the implementation and effectiveness of the risk mitigation strategies throughout the life of each contract package.
- Work with the client project schedulers/cost engineers to establish a traceable basis for cost and schedule contingency forecasting and modifications at both the contract and program levels.



Sound Transit – Bus Rapid Transit

P&M is providing risk manager and scheduling services on the Bus Rapid Transit (BRT) I-405 Project as part of Sound Transit's ST3 system expansion.

- **Risk Management** - Risk Management encompasses working with ST and project team to review the risk registers/run risk analysis for each of the individual projects that make up the program (about 20 projects total between Sound Transit and WSDOT), and running workshops with each of the projects and their teams to ensure that the best information is being fed to the Sound Transit risk team for use in their overall project risk profile.
- **Scheduling** – The scheduler works with the PMs for various segments/projects within the program to update the design schedules, provides updates to the integrated master schedule, generates construction schedules for various design milestones as a basis for construction contracts and reviews contractors' schedules during construction.



Sound Transit - Federal Way Link Design-Build Contract

P&M supported the Kiewit/Parsons design-build team with engineering management services including:

- **Cost Engineering** - perform earned value management; cash-flow analysis; trending and change management & progress reporting.
- **Scheduling** - develop baseline resource loaded schedule; update progress schedule and perform what-if analysis.
- **Document Controls** - during design & construction perform document controls of design related documents such as RFI's, design changes, notifications, letters, meeting notes, etc.
- **Specification Coordination** - interface with all discipline leads in editing and assembly of the master specifications submittal packages; provide standard formatting, track progress, and provide consistency across specification sections; performed verification of changes during the quality review.



Sound Transit - South Parking Garages D/B Program Management

P&M's services, as a subcontractor to HNTB (prime), is centered around supporting these projects with:

- Schedule development and oversight
- Change Management
- Cost estimating
- Document Controls and Project Administration Support



Port of Seattle: International Arrival Facility Program Management

P&M is providing an integrated program controls team with AECOM (prime) in support of the delivery of this program that includes program controls manager, cost estimating, scheduling, cost controls/risk management, document controls and project administration. The project is delivered through "Progressive Design/Build" and is first of its kind at the Port of Seattle. Cost estimating services entail developing independent cost estimates, finalization of owner's estimate and D/B cost estimates in support of GMP negotiations.



Port of Seattle: North SeaTac Airport Renovation Program Management

P&M provided program management services in a lead role for scheduling, cost engineering and cost estimating (independent cost estimates, finalization of engineer's estimate and reconciliation with the GC/CM cost estimates in support of MACC negotiations). The project entails renovations to the North Satellite, concourses C and D, and main terminal to accommodate the Alaska Airlines Group.



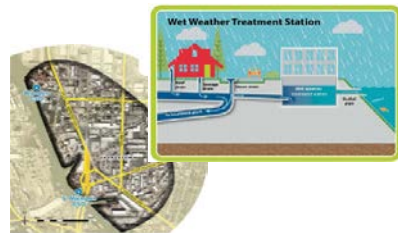
Port of Seattle: Terminal 5 Berth Modernization (2015-2018)

P&M provides risk assessment, risk workshop facilitation, schedule and cost quantitative analysis, CPM scheduling, cost controls, progress tracking and reporting for this major capital program. The project consists of upgrades and modifications to existing container terminal facilities to improving container berthing facilities to accommodate berthing and loading/unloading of larger ships.



King County Wastewater Treatment: North Mercer & Enatai Beach Interceptors Conveyance

P&M is providing cost estimating and scheduling under Tetra Tech including development and update of construction cost estimates; project and construction schedules from Options Analysis through Final Design. The challenges of the early design estimating on this project were the various types of conveyance routes being considered: land routes, direct bore routes, HD bore routes and lake bottom cut & cover routes. The project replaces sewer pipes serving areas of North Mercer Island, Bellevue near Enatai Beach, and the Town of Beaux Arts Village.



King County Wastewater Treatment: Georgetown Wet Weather Treatment Station

This project entails comprehensive engineering and consulting for the design, environmental compliance, construction, permitting and commissioning of the wet weather treatment station. P&M provided cost estimating and scheduling services. The estimating services included review of the planning level LTCP estimates and development of engineer's cost estimates from conceptual through final design while scheduling services included development and update of project and construction schedules at various design levels.



Vigor: WSF HEOC Ferry Program - DMS Implementation

P&M is supporting Vigor with document management services during their design and production of five (5) hybrid electric ferries for Washington State Ferries, including document control of functional design documentation, tracking of hazardous material certifications, and assessment of their old Document Management System (DMS), assisting the software vendor with the implementation of a new DMS, workflow development, training and training documentation.

Market Sectors

- Mass Transit
- Aviation / Airports
- Harbor/Marina Terminals & Facilities
- Transportation / Infrastructure
- Wastewater
- Power Plants & Energy Utilities
- Public Utilities
- Manufacturing



Awards:

2013 WTS Puget Sound Employer of the Year:
Small Business Category

Primary Contact:

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- DUNS No. 131846532; UEI No. MGU4DFHGKJZ3
- NAICS:541611,541512, 541519, 541618, 541330, 541690, 541990, 236220
- Cage Code: 3HU74
- King County SCS certified Firm (SCS # 174)
- WSDOT Approved Contractor/Consultant

P&M has strong record as an equal opportunity employer with diverse inclusion of woman and minorities in its consultant key staff and ownership!

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