



# Introductions

Mike Monteleone, Owner  
Pacific CM

Rob Price, Associate  
KPF Consulting Engineers



# Objectives

*Identify some key success factors for developing new DBE/Prime relationships on public projects.*

*Review lessons learned from Sub's and Prime's perspective on a recent project in Everett.*

*Consider issues/opportunities for owners & agencies when a new DBE/Prime Relationship is onboard.*



**DIVERSITY Expedition** *Pacific CM*



<http://www.pacificcm.com>

**Mike Monteleone**  
**President/Founder**



**DIVERSITY Expedition** *Mike Monteleone*

**Experience:**  
35 years of construction experience with civil, structural and infrastructure projects

**Education:**  
Masters Degree; Management MIM  
*Thesis: Risk Management for Construction Operations*  
BS Degree; Management

**Certification:**  
CMAA Certified Construction Management

**Noted Projects:**  
2009-16 ~ SDOT 4<sup>th</sup> Ave & Spokane St. Widening Bridge Projects; Seattle, WA  
2007-2013 ~ City of Tacoma, Condition Assessment 4 Projects; Tacoma, WA  
2005-2006 ~ Tacoma-Narrows Bridge; Tacoma, WA  
2004 ~ Bybee Bridge; Portland, OR  
2003 ~ Rood Bridge Replacement; Hillsboro, OR  
2000-2001 ~ Kruse Way & I-5; Portland, OR

**DIVERSITY Expedition** *Pacific CM Vision*

## Providing value through Experience and Integrity

Pacific CM is a Small, DBE firm that believes in the value of Diversity. We seek individuals from all walks of life and culture to mix together a diverse pool of experienced professionals.

As a diversified team we provide a manifold of education, proficiency, competence, and know-how.

**DIVERSITY Expedition** *Pacific CM*

**Certifications:**  
DBE - Disadvantaged Business Enterprise  
SEDBE - Socially and Economically DBE  
SCS - Small Contractor & Supplier

**Product:**  
Risk Management, Quality Assurance

**Services:**  
Risk Management in the form of quality assurance  
Quality Control  
Inspection  
Document Control



*Inspecting concrete forms*

DIVERSITY
Pacific CM - History
Expedition

Contract Title	Contractor / Prime	Award Date
SDOT A&E Services - On Call	Prime	8/15
ST Audit Svcs	Terracon	5/16
SDOT A&E Services - On Call	KBA	6/16
Port of Seattle CM IDIQ	Heery Intl	1/17
CT SWIFT 128th Street	KPFF	2/17
King CO PSERN	KPFF	7/17
CT SWIFT Green Line	KPFF	8/17
D/B SVCs for IAF	Clark Const.	10/17
CT MCOB	KPFF	4/18
CT A&E Services	Prime	6/18
King CO Harbor Island	KPFF	8/18
King CO Transit CM	KPFF	9/18

Revenue

Year	Revenue
2015	Low
2016	Low-Mid
2017	Mid
2018	High

DIVERSITY
Pacific CM Business Model
Expedition

### Our Business Model

- Our QA/QC professionals
- Business model focus
- Training & Certification

### Benefits of Teaming Opportunities

- Experience
- Talent Development
- Diversity
- Successes
- Moderating growth
- Future opportunities



**kpff**

**Rob Price, Associate**  
Project Manager, Port of Seattle 1992-2000  
Ops Manager, Port Construction Services 2001-2006  
Construction Project Manager, KPFF 2007-present

**KPFF Consulting Engineers**  
1,200 employees  
18 Reporting Centers

**Special Projects**  
Seattle, Tacoma, Long Beach (CA)  
Civil, Structural, Mechanical, PM/CM  
84 employees



**What lead Pacific CM to KPFF?**

A small business outreach event

We explained the level of expertise of our available QA/QC professionals

We were afforded an opportunity....

**DIVERSITY Expedition** Partnerships



### Partnership

A **partnership** is an arrangement where parties, known as partners, agree to cooperate to advance their mutual interests - Wikipedia

### How we've applied it...

- Teaming
- Performance Management
- Staffing
- Training
- Contract Language
- Logistics & Co-Location
- Future Pursuits

**DIVERSITY Expedition** Swift Green Line

**Client:**  
Community Transit

**Location:**  
Everett, WA

**Construction Cost (est.):**  
128<sup>th</sup> Street & I-5 (\$4M), Corridor Stations (\$21M)

**CM Team:**  
KPFF (Prime), Pacific CM, MDM CM



**DIVERSITY Expedition** *Swift Green Line - CM Team*

**Prime:**  
KPF Consulting Engineers, Special Projects

**Inspection/Quality Assurance:**  
Pacific CM  
MDM Construction Management

**Special Testing & Inspection:**  
Mayes Testing Engineers, a Terracon Company

**Geotechnical:**  
Robinson Noble



**DIVERSITY Expedition** *Swift Green Line*

**Field Office:**  
Open concept  
Shared space  
Central location





**DIVERSITY Expedition** *Swift Green Line*

**KPFF Scope For CM Services:**

- Pre-Construction Services
- Quality Assurance – Field Inspection
- Special Testing & Inspection
- Document Management System
- Quantity Tracking
- Change Management
- Buy America Compliance
- Project Closeout



*Community Transit Swift – Blue Line*

**DIVERSITY Expedition** *Swift Green Line*

**Pacific CM Scope**

- Quality Assurance
- Inspector Daily Reports
- Quantity Tracking/Field Construction Record (FCR)
- Grant Requirements
- Buy America Verification
- Certified Payroll Audit
- Change Order documentation



*Excavation for new station*

**DIVERSITY Expedition** *Swift Green Line*

## Benefits of the KPFF/Pacific CM Team to the project

- The Contractor(s)
- The Public
- The Owner/Client
- The Documents
- Challenges and successes
- Project Complexity
  - Multiple agencies
  - Complex permitting/scheduling
  - Night work
  - Continual changing subgrade conditions



*Full station at completion*

**DIVERSITY Expedition** *Teaming Success Factors*

## Communication Systems

- e-Builder<sup>®</sup> - Electronic Document Management System
- Owner / CM team / Contractor interface
- Shared Training experience(s)
- Shared Roles – Open lines
- Fair and Honest Discussions - Partners

**DIVERSITY Expedition** *Teaming Success Factors*



### Shared Systems

- Document Management
- Network files on MS One Drive
- Shared Library
- Shared Training Programs

### Team Environment

- Open office environment
- Cross Team Building (BBQ, Birthdays...)

**DIVERSITY Expedition** *Teaming Success Factors*

### For the Prime


- Risk Management**
  - Cross check of plans, documents and quality control
  - Project evaluation, oversight and management
- Utilize on-call/IDIQ contracts**
  - Smaller scopes, easier to team vs. proposal stage
  - Large pool of expertise without adding to overhead costs

**DIVERSITY Expedition** *Teaming Success Factors*

## For the Prime

Prompt Payment Processes:  
Active communication about payment status  
Quick turnaround with payments

Streamlined Contract:  
Simple & Fair Terms/Conditions  
Clear Scope



*"If you think it's expensive to hire a professional to do the job, wait until you hire an amateur."  
- Red Adair*

**DIVERSITY Expedition** *Teaming Success Factors*

## For the Owner

Facilitate partnerships through on-call/IDIQ contracts  
- smaller scopes, easier to team

Prompt payment processes  
- help and flexibility with contracts/invoicing  
- quick turn around with questions/corrections  
- proactive communication about issues/payments

**DIVERSITY Expedition** *Teaming Success Factors*

## For the Owner ~ Small firm advantages

- Quick response time
- Client focused service
- Localized service and employees
- Contractor-based experience QA/QC professionals
- Best value-Lower overhead
- Diverse pool of expertise
- Small Business/DBE participation



**DIVERSITY Expedition** *Teaming Success Factors*

## For the Small Firm

**Relationships:**

- Other Owners/Agencies
- Other Primes
- Other sub-contractors

**Marketing:**

- Grow larger networks
- Find more project opportunities
- Increase project credentials



*Merrill Creek Base Paving Project*



## For the Small Firm

### Development of Systems:

- Project Networks
- Software Systems
- Training Opportunities

### Cash Flow:

- Pool of Professionals
- Pool of Resources
- Staffing and Key Positions



## Pacific CM Previous teaming experiences:

- URS SDOT 4<sup>th</sup> Ave Ramp
- Jacobs/ URS Spokane St. Widening
- City of Tacoma
- Community Transit Merrill Creek Operating Base



# DIVERSITY Expedition *Teaming success*

## Continued partnership(s)

Moving forward with new contracts/Pursuits

- King County CM
- King County PSERN
- King County Dock Demolition
- MCOB Paving
- Port of Seattle

What's next for Pacific CM?

- Our Growth Goals
- Our Staffing Issues
- Future Relationships



# DIVERSITY Expedition *Summary/Conclusions*





The screenshot shows a webpage from Transportation.gov. The main heading is "2018 Small Business Week - Pacific CM". Below the heading is a photograph of four people in high-visibility vests looking at documents on a table. A caption below the photo reads "Owner: Mike Monteleon second from the left". To the right of the photo is a "Contact Us" section for the Office of Small and Disadvantaged Business Utilization, including address, phone, and social media links.



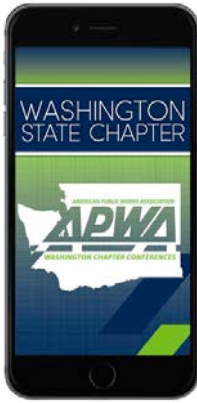
# Thank You

**Mike Monteleone, Owner**  
Pacific CM  
Tel. (206) 886-8164  
Email. [mikem@pacificcm.com](mailto:mikem@pacificcm.com)

**Rob Price, Associate**  
KPFF Consulting Engineers  
Tel. (206) 382-0600  
Email. [Rob.price@kpff.com](mailto:Rob.price@kpff.com)



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