

Technical Advisory Group Recommendations Implementation and Wrap-Up

*Community Oversight Panel
1/8/2025*



TAG Recommendations Implementation & Wrap-Up

Why are we here today?

- Provide an update on agency implementation of Technical Advisory Group (TAG) recommendations
- Discuss Next Steps

Technical Advisory Group Implementation

Focus Areas

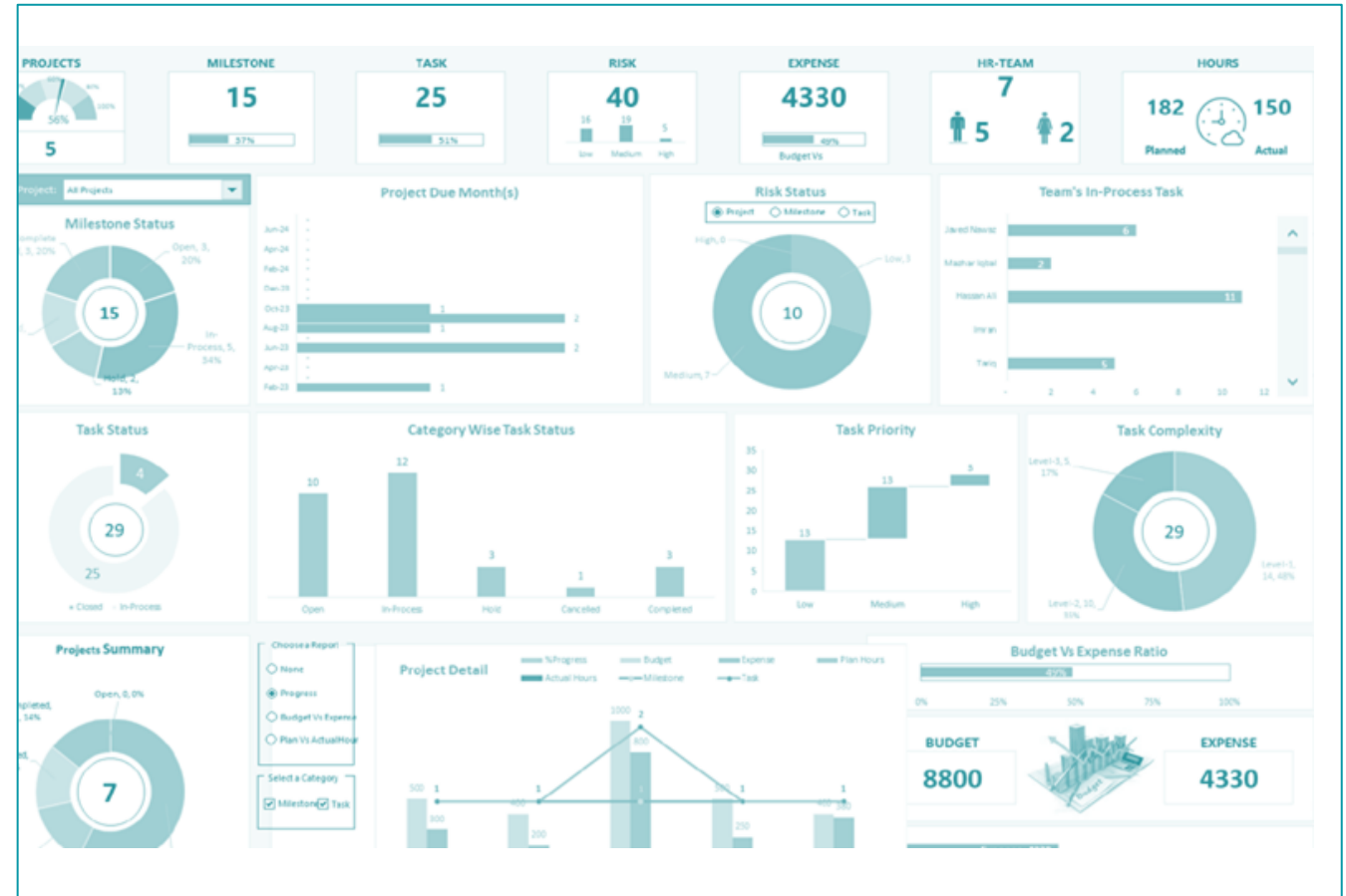
	TAG 1 Rebuild trust and clarify the roles for ST Board and staff.	TAG 2 Introduce an experienced megaproject capital program executive team.	TAG 3 Implement procedures that push decision-making down to the lowest	TAG 4 Align key procedures with industry best practices	TAG 5 Strengthen and enforce an agency betterment policy	TAG 6 Engage the Federal Transit Administration (FTA) as a delivery partner
Sound Transit Initiative						
Project Management Information System (PMIS)	<ul style="list-style-type: none"> • Application selection on track completing market research and peer agency reviews • Streamlined processes and dashboards on schedule for release with improves accountability and transparency • Initiated data standardization workstream to fast track for PMIS implementation 					
Project Change Management	<ul style="list-style-type: none"> • New collaborative delivery approaches – methods, dept. wide training in progress • Streamline decision making – delegation of authority under review • Focus on change management – Sunset Change Control Board, construction manual update in progress 					
Procurement & Contracting	<ul style="list-style-type: none"> • Industry engagement – in progress and ongoing for the life of the program • Refresh procurement and contract docs is underway • Portfolio wide procurement strategy underway 					
Organizational Restructure	<ul style="list-style-type: none"> • New Capital Delivery Executive Directors onboarding • Change management workshops 					
Betterments and Scope Control	<ul style="list-style-type: none"> • Betterment policy implementation • Project partnerships with AHJs to align scope 					
Partnerships	<ul style="list-style-type: none"> • Increased collaboration with external partners – revisit MOUs, monthly meetings • Provided FTA with a proposed coordination schedule for planning – adhoc, monthly and quarterly meetings • Creation of joint project office in planning 					

Project Management Information System (PMIS)

What is PMIS?

A **Project Management Information System (PMIS)** supports an organizations' ability to **manage project information, plan, execute, monitor, and control projects**. PMIS systems includes a variety of tools to streamline project phases.

PMIS implementation to begin Q1 2025



Project Management Information System (PMIS)

Build trust, improve decision making, implement industry best practices

Project Management Information Quality

- Adoption of project management information industry best practices.
- Consistent reporting and accessible dashboards available to all agency stakeholders.
- Provide a single source of project information, from concept to completion.

Project Management Process Improvements

- Empower staff to efficiently make decisions at the lowest appropriate level.
- Provide clarity around delegations, and process activities to improve efficiency.

Reinforce Owner of Choice behaviors

- Equitable access to PMIS platform for project planning, design and delivery collaboration.
- Smooth PMIS onboarding and adoption with industry partners.
- Increase industry engagement through procurement forecast visibility.

Change Management

Collaborative Delivery

- ST Roadshow with new messaging
 - Procurement forecasts, streamline procurement
 - Workshops and RFIs to get their input
 - AGC partnership
 - Contract Refinements (20+)
 - Internal issues (Prompt Payment, non-PLA work)
 - Collaborative Delivery (GCCM, PDB)
- Bundling strategy
- Team decision making
- ST2 Lessons learned
- Scope of work clarity
- Timely payments
- Change order conformance
- Workforce and business inclusion



Aug. 21 Cost Estimating Summit above
AGC Stride Open house below



**ASSOCIATED GENERAL
CONTRACTORS OF AMERICA**



Change Management

Investment in our Team

One Integrated Department

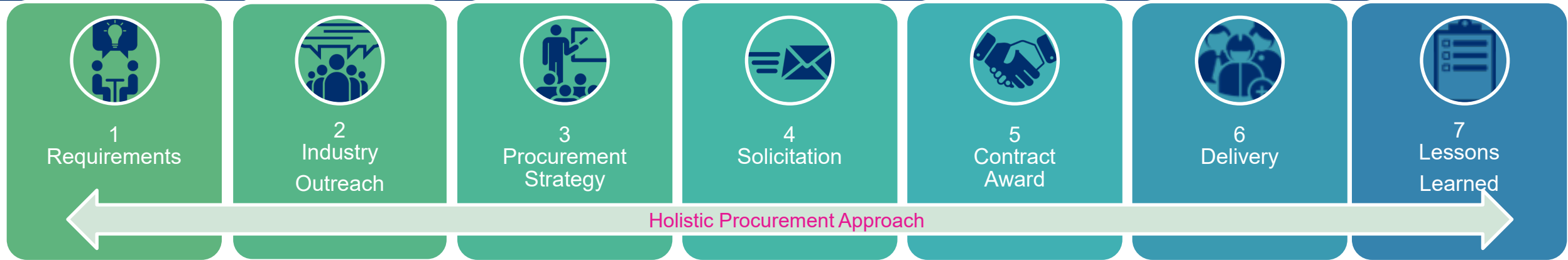
- Training – Technical and Soft skills
- Owner of choice focus, one project team
- Working groups and learning summits
- Unified mission and vision
- New team members
- Role and responsibility clarity
- Monthly all hands
- Update delegations of authority



July 8 DBIA Progressive Design-Build (PDB) training, hosted by ST, included staff from WSDOT and the Port of Seattle.

Procurement and Contracting

Simplify, streamline, partner, and scale for ST3



Owners understanding of the project	Engagement with industry partners	Appropriate strategy for the project	Clear and efficient solicitation	Negotiate and award contracts	Capture performance and provide feedback	Lessons Learned
METRICS						
<ul style="list-style-type: none"> • Scope and other procurement docs are complete • Updated contract • Relevant Quals, Past Performance • Project management plan is complete 	<ul style="list-style-type: none"> • # outreach events • # Project Workshops • # engagement with HUBs and new firms • # new firms that attend outreach • Outreach well ahead of solicitation 	<ul style="list-style-type: none"> • Rolling 2 yr. Min. Forecasts • # RFIs • Clear risk allocation • Robust workforce and business inclusion goals 	<ul style="list-style-type: none"> • # Respondents • # RFIs • Allow appropriate time to bidders • Quality of proposals • Cost proposals within the target budget 	<ul style="list-style-type: none"> • Negotiation time • Board approval time • # protests • Awards within project schedule • Awards within target budget 	<ul style="list-style-type: none"> • Annual performance reviews and • Annual partner meeting • HUB Roundtables 	<ul style="list-style-type: none"> • End of contract joint lessons learned • ST partner performance report • Lessons Learned action plan • Use past performance on future solicitations

Procurement & Contracting

Professional Services

- Bring best in class partners via nimble contracts that can support the capital program
- Use efficient and timely procurement processes
- MATOC: Multiple Award Task Order Contract (type of bench or on call contract)
- Agency wide bench contracts supports a collection of projects or tasks
- Planning and Environmental, Design and Project Management, Construction Management
- Multi year awards with funding capacity to support ST3
- Expedites future work thru task orders and reduces number of procurements
- Allows more prime awards to SBEs and DBEs

Procurement & Contracting

Equity in Infrastructure Pledge

Monumental Commitment to Equity

- The Equity in Infrastructure Project (EIP) commits to build generational wealth and reduce the racial wealth gap by improving public infrastructure contracting practices to create more prime, joint venture and equity contracting opportunities for Historically Underutilized Businesses (HUBs).



Seattle Pledge Signatories

Sound Transit

Port of Seattle

King County Community Transit

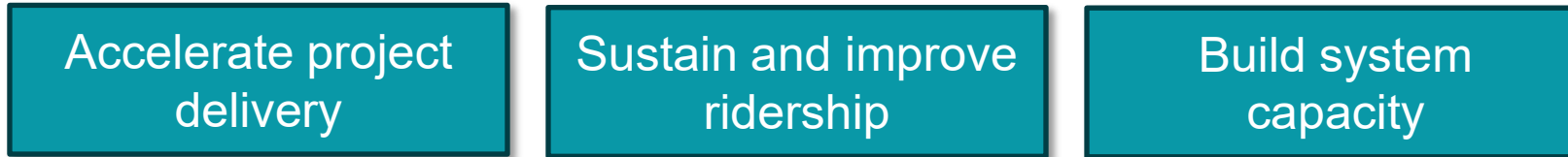
City of Seattle

Hill International

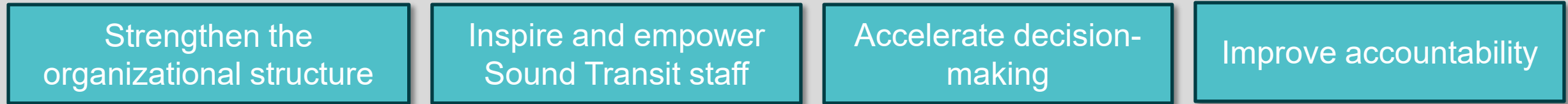
Organizational Restructure

Project MOST Objectives are aligned with the agency's priorities

Agency Priorities



Project MOST Goals



Project MOST Design Criteria



Organizational Restructure

One ST

CEO

Diversity,
Equity, &
Inclusion

People &
Culture

Strategy

Agency
Oversight

Capital
Delivery

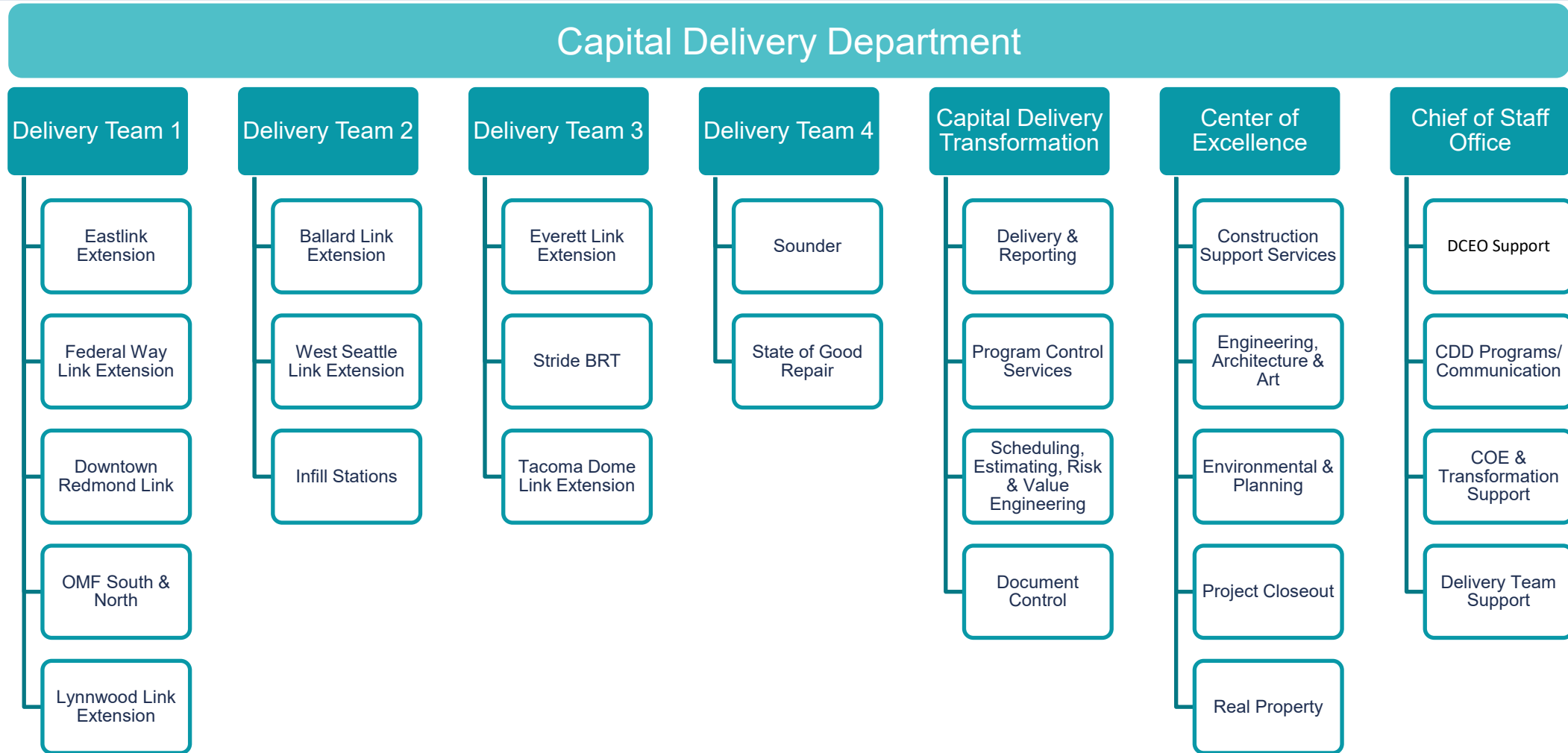
Finance &
Business
Administration

Service
Delivery

Legal

Organizational Restructure

Project MOST



Betterments

What are Betterments?

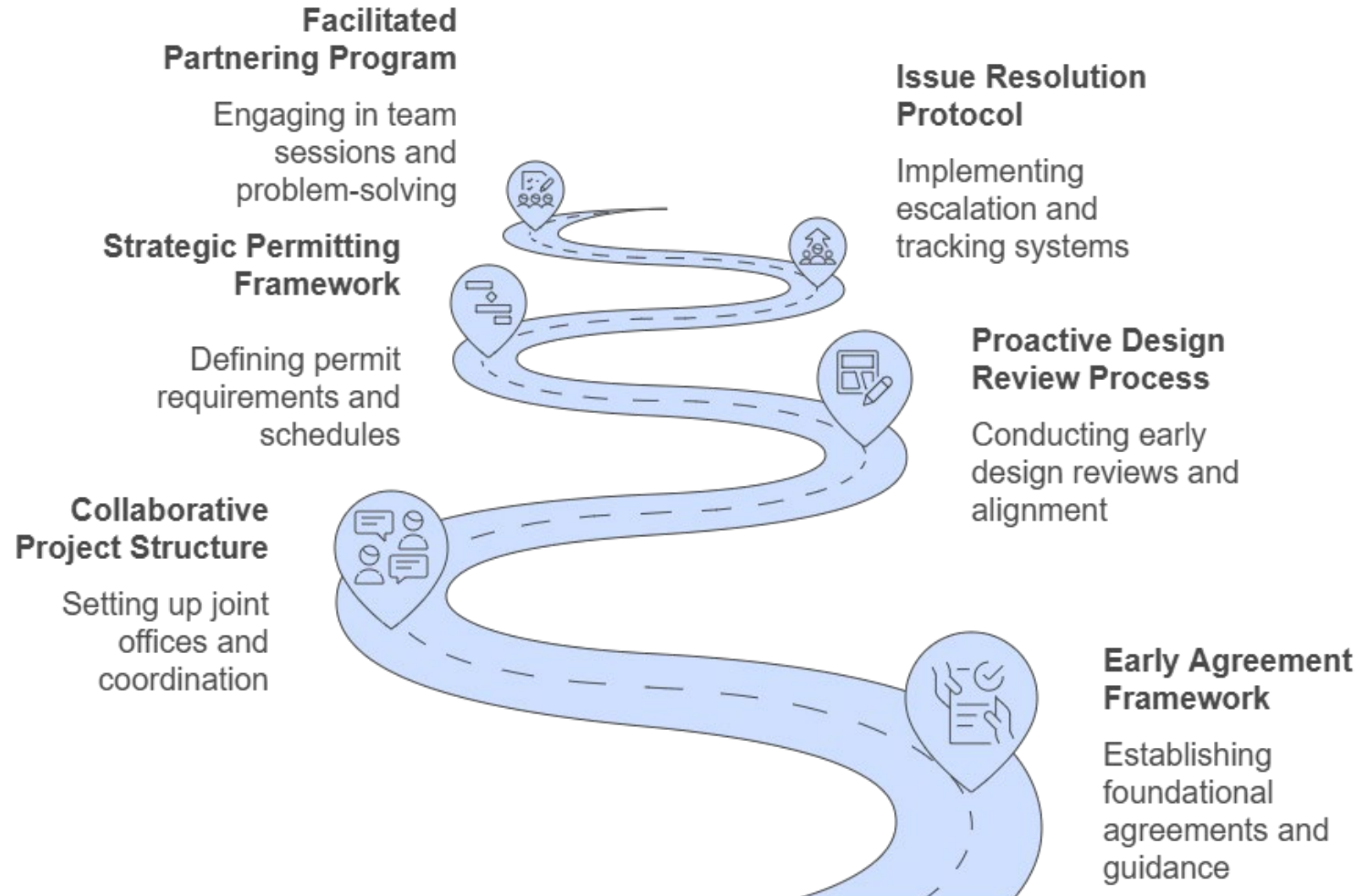
FTA Definition: An improvement or upgrade made to a project that exceeds what is required for restoring or replacing an existing asset to its original condition, functionality, or capacity. Betterments typically provide additional features, enhanced capacity, or an improved standard of performance. May include Owner Betterments, AHJ Betterments, Code Interpretations, etc.

Does not include:

- Initial voter-approved scope
- Standard agency design elements
- Required environmental mitigation
- Board-defined baseline scope

Betterments and Scope Control

Roadmap



Partnerships

Connecting governing and industry partners to support Sound Transits Capital Program

Partnerships are needed to work jointly to support timely reviews, employ efficient processes, establish accountability, eliminate delays and move projects through the development phase to deliver the capital program.

- Federal Transit Administration (FTA)
- WSDOT, Port of Seattle and other partners
- Authorities having jurisdiction (AHJs)

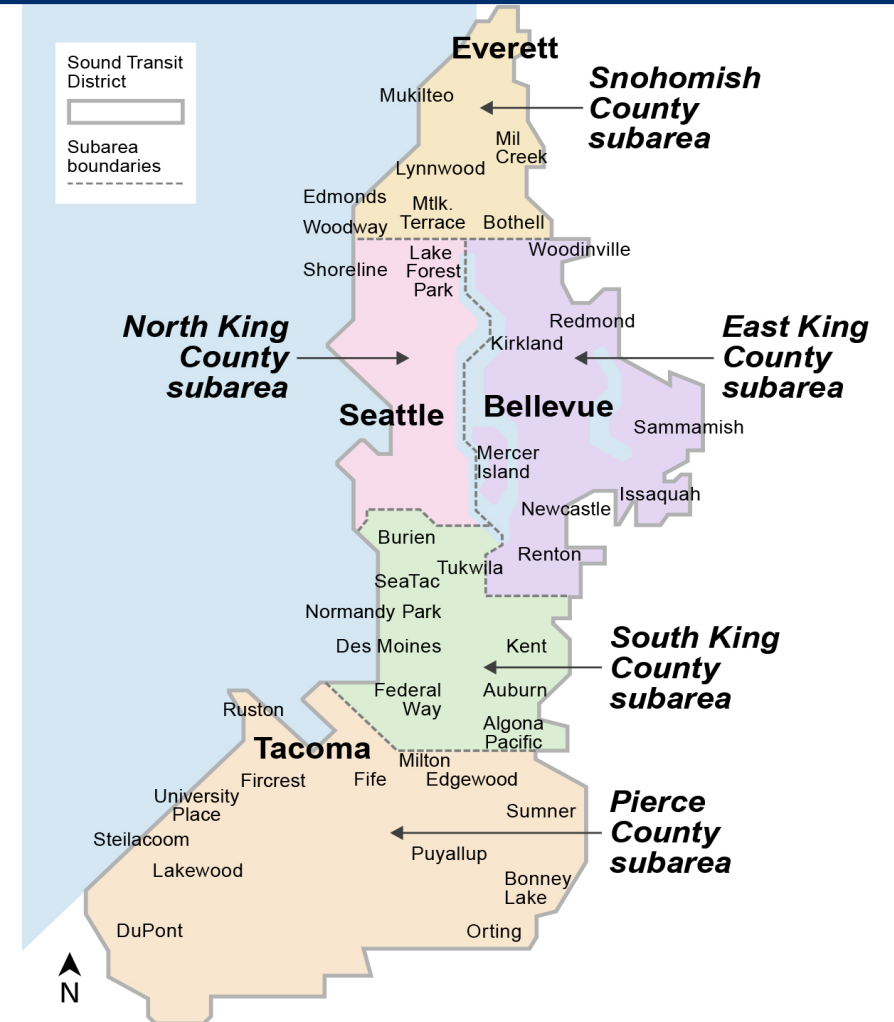


Partnerships

Authorities Having Jurisdiction (AHJs)

An AHJ is an entity responsible for enforcing codes, standards and regulations related to construction and fire/life safety.

- Early engagement to set alignment of goals, expectations, and resources
- Ongoing, regular meetings (staff & executive levels)
- Conduct Informal/formal ‘over-the-shoulder’ reviews
- Engage in formal partnering
- Conduct regular code interpretation reviews
- Permitting consistency
- Joint project offices



Technical Advisory Group implementation

Implement Key Performance Indicators (KPIs) to measure and track performance

Sound Transit Initiative	TAG 1 Rebuild trust and clarify the roles for ST Board and staff.	TAG 2 Introduce an experienced megaproject capital program executive team.	TAG 3 Implement procedures that push decision-making down to the lowest	TAG 4 Align key procedures with industry best practices	TAG 5 Strengthen and enforce an agency betterment policy	TAG 6 Engage the Federal Transit Administration (FTA) as a delivery partner	Key Performance Indicators (KPIs)
Project Management Information System (PMIS)	<ul style="list-style-type: none"> • Application selection on track completing market research and peer agency reviews • Streamlined processes and dashboards on schedule for release with improves accountability and transparency • Initiated data standardization workstream to fast track for PMIS implementation 						Q1 2025 start implementation Track milestones/early wins Streamline processes via PMIS
Project Change Management	<ul style="list-style-type: none"> • New collaborative delivery approaches – collaborative delivery methods, dept. wide training in progress • Streamline decision making – delegation of authority recommendation coming to the board • Focus on change management – construction manual update in progress and training in progress 						Training and new approaches Policy updates Speed of decision making
Procurement & Contracting	<ul style="list-style-type: none"> • Industry engagement – in progress and ongoing for the life of the program • Refresh procurement and contract docs is underway • Portfolio wide procurement strategy underway 						Industry outreach Contract refresh Cost workplan Increased competition
Organizational Restructure	<ul style="list-style-type: none"> • New Capital Delivery Executive Directors • New Capital Delivery Department 						New department in place Exec Directors in place and in progress
Betterments and Scope Control	<ul style="list-style-type: none"> • Betterment policy implementation • Project partnerships with AHJs to align scope 						Track resolutions and timing Track cause and impacts
Partnerships	<ul style="list-style-type: none"> • Increased collaboration with external partners – revisit MOUs, monthly meetings • Provided FTA with a proposed coordination schedule for planning – adhoc, monthly and quarterly meetings • Creation of joint project office 						Joint schedule/variance reports MOU/LOA agreements Joint strategy to support ST3

Questions?



 *soundtransit.org*

