

## **WORKFACE PLANNING FOR CM CONTRACTS**

### **3.0 WORKFACE PLANNING**

Owner requires that Construction Management (CM) Contractor verify and servile the implementation of WorkFace Planning by the Construction Contractor, in accordance with the Construction Owners Association of Alberta (COAA) model as published on the COAA website ([www.coaa.ab.ca](http://www.coaa.ab.ca).) The CM shall review and comment on Construction Contractor's submitted Workface Execution Plan taking into account the minimum standards of the COAA model contents and monitor Construction Contractor's implementation being in accordance with terms and conditions agreed between Owner and Construction Contractor.

The Construction Contractor's WorkFace Planning Execution Plan, complete with a WorkFace Planning Score Card, shall be prepared by the Construction Contractor and submitted to CM Contractor for review and the Owner for review and approval no later than 90 days in advance of the beginning of permanent plant installations at the Site or as otherwise agreed. The CM Contractor shall submit comments to the Owner for review and with the Owners comments may be submitted to the Construction Contractor for inclusion to the Workface Execution Plan prior to approval.

CM Contractor shall, as part of its work scope as required by Owner, conduct periodic audits and ongoing surveillance of the Construction Contractor - WorkFace Planning efforts including its lower tier subcontractors using the WorkFace Planning Score Card at the frequency and times noted therein. Owner shall monitor and reserves the right at any time deemed necessary to review audit results performed by CM group using the WorkFace Planning Score Card on the execution of the Construction Contractor's Workface Execution Plan throughout the duration of the contract to determine if WorkFace Planning is being implemented in accordance with the agreed upon Workface Execution Plan. In cases where significant deviations to the Workface Execution Plan are identified either by the Owner or the CM Contractor, the Construction Contractor shall immediately prepare an action plan for correction of the deficiencies and shall immediately implement this plan upon approval of the owner.

The Construction Contractor will divide a Work Design Area into a series of preferred Construction Work Packages (each a "CWP"). These CWP definitions will be issued to the Owner, CM Contractor and Engineering Contractor in order to align relevant portions of the overall scope of Work with the Engineering deliverables e.g.: Engineering Work Packages (EWP's), Materials and Equipment. With Owner and CM Contractor participation, Construction Contractor and Engineering Contractor shall discuss and form agreement for mutual benefit with regard to this packaging boundaries. This cooperation shall continue throughout the project to completion.

If EP Contractor and Construction Contractor can not agree on the EWP/CWP breakdown the Owner together with the EP Contractor and Construction Contractor will formulize an agreement that is beneficial to the overall project.

During the EDS or preliminary engineering stage of the project, as a result of agreement between the Engineering Contractor and the Construction Contractor, the Construction Contractor will identify the CWP's and develop a CWP Release Plan: that will specify the number, approximate manhour size, and release date of each CWP. The CWP Release Plan will include standard templates to be used, the number of packages, and planned craft loading to accomplish the tasks in the CWP's. Construction Contractor shall submit the CWP Release Plan to the CM Contractor for review and Owner for review and approval. If Owner or CM Contractor has comments on the initial submittal and if requested by Owner, the Construction Contractor will resubmit the CWP Release Plan which will include Owner's and/or CM Contractor's comments in order to gain Owner's approval. The date of the Construction Contractor's initial submittal of the CWP Release Plan is to be agreed upon between Owner, CM group and Construction Contractor at the beginning of the EDS or preliminary engineering phase.

Each CWP will include but not limited to the following:

- A detailed description of the Scope of Work for a defined area that has been released for execution by the Construction Contractor
- A detailed Bill of Materials (BOM) specifying all quantities making up the scope of Work released by the CWP.
- A schedule detailing commencement and completion dates for scope of Work released by the CWP.
- Technical requirements, references and information pertinent to the scope of Work released in the CWP.
- Safety considerations with respect to the Work / Risk Assessment.

As Issued-for-Construction (IFC) CWP's are released, the Construction Contractor and/or its lower tier subcontractors shall provide the following:

- Roles and responsibilities for Construction Contractor and Sub-Contractors
- Safety considerations with respect to the Work / Risk Assessment.
- Dedicated, suitably trained WorkFace Planners who have either completed the COAA Fundamentals Course or equivalent Owner-developed course to break the CWP into a series of specific WorkFace Planning work packages called Field Installation Work Packages (FIWP's). These dedicated WorkFace Planners will be accountable to complete and signoff as ready the FIWP's before the FIWP is released to the crew.
- Dedicated Integration Planner with assigned responsibility to coordinate and lead the efforts of the WorkFace Planners and resolve anticipated conflicts proactively between the different FIWP's.
- Dedicated Resource Coordinators with assigned responsibility for areas such as material identification and control, scaffolding, construction equipment, specialty tools, and other resources needed to support the WorkFace Planning effort.
- Experienced personnel including craft supervision to review the scope and completeness of FIWP's.

- Work force and leadership to execute FIWP's.
- Personnel and systems to report progress and performance of FIWP's in an agreed upon format and frequency with the Owner.
- Prepare and maintain detailed schedules and spreadsheets tracking, monitoring, and closing-out FIWP's from start to completion of each FIWP during the construction phase of the project.
- Provide quality assurance personnel to audit compliance to FIWP instructions and requirements

Prior to the CWP's reaching IFC stage, the Construction Contractor and/or its lower tier subcontractors shall develop a preliminary FIWP Release Plan for each CWP indicating the approximate size and planned release date for each FIWP. The Owner and CM Contractor will review the Contractor's FIWP Release Plan and Owner shall approve. If Owner or CM Contractor has comments on the initial submittal and if requested by Owner, the Construction Contractor will resubmit the FIWP Release Plan which will include Owner's and/or CM Contractor comments in order to gain Owner's approval. The date of the Contractor's initial submittal of the FIWP Release Plan is to be agreed upon between Owner, CM Contractor and Construction Contractor during the EDS or preliminary engineering phase of the project.

The Construction Management Contractor shall be responsible for the following:

- Review and comments on the Construction Contractor's - CWP Release Plan, CWP – EWP alignment and other appropriate items, these comments shall be submitted to the Owner for review and may be included with the Owners comments and submitted to the Construction Contractor for inclusion to the Plan prior to approval by Owner
- Review the detailed description of the CWP Scope of Work for a defined area and submit comments to Owner for review and may be include with the Owner's comments and submitted to the Construction Contractor for inclusion in the Plan prior to the release for execution by the Construction Contractor
- Monitor, audit and perform ongoing surveillance on the Construction Contractor's - Construction Work Package Release Plan and its execution as requested by Owner
- Review and comments on the Construction Contractor's – Field Installation Work Package Release Plan, these comments shall be submitted to the Owner for review and may be included with Owners comments and submitted for inclusion to the Plan prior to approval by Owner
- Monitor, audit and perform ongoing surveillance on the Construction Contractor's – Field Installation Work Package Release Plan and its execution as requested by Owner
- Issue copies of audit schedule's and audit findings to the Owner