

MTO - ACEC-ONTARIO CONTRACT ADMINISTRATION SUBCOMMITTEE MEETING NOTES

Date: November 7, 2023
Time: 1:00PM
Location: MS Teams
Adjourn: 5:00pm

ATTENDEE	ORGANIZATION	ATTENDEE	ORGANIZATION
Khalid Backtash	MTO	Dave Currie	McIntosh Perry
Finlay Buchanan	MTO	Doug DeRabbie	ACEC-Ontario
Andrea Bulanda	MTO	Sebastian Flaszynski	AECOM
Adriano Cesarone	MTO	Melo Helder	HDRINC
Kevin English (co-chair)	MTO	Phil Hutton	EXP
James Hamilton	MTO	Bernard James	Parsons
Zhiyong (Gem) Jiang	MTO	Naveen Kaushik	Conсор
David Kerr	MTO	Sunil Kothari	SNC
Rebecca Li	MTO	Bill LaRosa	Morrison Hershfield
Ryan McKerracher	MTO	Christopher McBride	WSP
Tyler McQuaker	MTO	(co-chair)	
Lovina Pereira	MTO	Graham Sled	GHD
Seyed Tabib	MTO		
Erika Varga	MTO		

WELCOME / INTRODUCTIONS / ANNOUNCEMENTS / SAFETY MOMENT
<ul style="list-style-type: none"> • ACEC-Ontario has changed their members list. The committee tab on MTO's Technical Consultation Portal has been updated. • David Kerr is attending on behalf of Kevin Boudreau and Tyler McQuaker is attending on behalf of Gary Weiss. <p>Safety Moment: Hearing Protection safety talk led by Tyler McQuaker.</p> <ul style="list-style-type: none"> • Hearing loss is non-reversible and cumulative. • Tyler reminded the attendees to use proper hearing protection at work and in personal situations.

OPEN ITEMS:	ACTION BY
<p>Nov-23-01 AGENDA ITEM: CONSTRUCTION ADMINISTRATION AND INSPECTION SPECIFICATIONS (CAIS)</p> <p><i>Description:</i></p> <ul style="list-style-type: none"> • MTO rolled out CAIS in spring 2023 and is interested in receiving feedback on implementation (e.g. anything missing; what is working; what is not working, etc). 	

OPEN ITEMS:	ACTION BY
<p><i>Discussion:</i></p> <ul style="list-style-type: none"> • ACEC-Ontario canvassed their members and the general feedback is positive. • ACEC-Ontario did note that there is difficulty in how the CAISs are inserted into CMS and it is a bit of a tedious process when referring to CAISs in diary entries in CMS. • ACEC-Ontario was reminded to share comments through CAIS email (CAIS@ontario.ca). <p><i>Action – Item closed.</i></p>	
<p>Nov-23-02 AGENDA ITEM: SUBCOMMITTEE WORK PLAN</p> <p><i>Description:</i></p> <ul style="list-style-type: none"> • Refresh the subcommittee workplan, to support the new Terms of Reference. <p><i>Discussion:</i></p> <ul style="list-style-type: none"> • CAIS Lessons Learned (2023-02) has been changed to Completed. • All other workplan items are Ongoing. • No additional workplan items to be added at this time. <p><i>Action – None.</i></p>	
<p>Nov-23-03 AGENDA ITEM: STAFF EXPERIENCE EQUIVALENCY FOR IQAF ASSIGNMENTS</p> <p><i>Description:</i></p> <ul style="list-style-type: none"> • On Public-Private Partnership [P3] projects that necessitated a high complexity Independent Quality Assurance Firm [IQAF] role, ACEC-Ontario requested that experience be recognized by MTO. <p><i>Discussion:</i></p> <ul style="list-style-type: none"> • ACEC-Ontario noted that some MTO expressions of interest (EOI) note that contract administration experience on Metrolinx assignments will not be considered as an equivalent for MTO assignments. • ACEC-Ontario wants to ensure that individuals that provide IQAF services do not receive gaps on their experience profiles. • ACEC-Ontario wishes to see that CA firms working on MTO infrastructure through a P3 model receive credit for that experience, as well as municipal work and Metrolinx projects. • Is there a workable solution to bridge the gap? <p>Actions -</p> <ul style="list-style-type: none"> • #1 – Provide examples of assignments that state experience with other jurisdictions (e.g. Metrolinx) will not be considered as an 	<p>ACEC-ONTARIO</p>

OPEN ITEMS:	ACTION BY
<p><i>equivalent to an MTO assignment.</i></p> <ul style="list-style-type: none"> • #2 – Provide update of internal consultations at next meeting. 	<p>MTO</p>
<p>Nov-23-04 AGENDA ITEM: PEO SUSPENDING EIT PROGRAM AND IMPACT TO JUNIOR INSPECTOR / SENIOR INSPECTOR QUALIFICATION REQUIREMENTS</p> <p><i>Description:</i></p> <ul style="list-style-type: none"> • On May 15, 2023, the EIT program option was suspended for new applicants by PEO. • MTO generic documents have been updated including Notes to User with a link to accredited Canadian universities (https://peo.on.ca/licence-applications/become-professional-engineer/academic-requirements/canadian-universities) <p><i>Discussion:</i></p> <ul style="list-style-type: none"> • ACEC-Ontario met with PEO Registrar. • PEO maintains a listing of national and international accredited engineering programs. • ACEC-Ontario and its member firms agreed to verify the education credentials of engineering graduates of their respective firms as a solution to the cancellation of the EIT program and MTO would accept that verification for those individuals to provide inspection duties on assignments. • MTO will update the RFP template to reflect that ACEC-Ontario member firms will verify individuals engineering education to perform inspection duties. <p><i>Action – Item closed.</i></p>	<p>MTO</p>
<p>Nov-23-05 AGENDA ITEM: QUALIFICATION CRITERIA FOR CONSTRUCTION ADMINISTRATION – REVISIONS</p> <p><i>Description:</i></p> <ul style="list-style-type: none"> • Qualification criteria for construction administration were updated. • Changes include removing ambiguity, providing clear guidance to enhance consistency of submissions, and enhancing efficiency of reviewing submissions. <p><i>Discussion:</i></p> <ul style="list-style-type: none"> • MTO implemented changes to the qualification criteria for construction administration. • ACEC-Ontario still has some concerns. • ACEC-Ontario would like to receive some additional context for the changes: what were the challenges in the previous criteria that drove the changes? What are the changes trying to address? <p><i>Action – Submit concerns in writing and follow-up with the MTO</i></p>	<p>ACEC-ONTARIO</p>

OPEN ITEMS:		ACTION BY
	<i>representatives of the subcommittee.</i>	
Nov-23-06	<p>AGENDA ITEM: CORPORATE PERFORMANCE RATING (CPR) WORKPLAN</p> <p><i>Description:</i></p> <ul style="list-style-type: none"> MTO presented a CPR pause workplan at the May 17, 2023, Engineering Subcommittee meeting. ACEC-Ontario requested the plan to be presented to the CA Subcommittee and become a standing item at future meetings. <p><i>Discussion:</i></p> <ul style="list-style-type: none"> MTO continues to work on the item including monitoring of evaluation completion rates and quarterly CPR's. An internal review is being initiated to review the RFP evaluation methodologies and approaches used by project managers. It is MTO's goal to keep the pause period as short as possible before reimplementing an improved system. MTO continues to meet internally to consider roll out of training, improvements to the Excel spreadsheet and internal communications. ACEC-Ontario continues to see gaps in the completion of appraisals (estimate 50-60% completion rate) and noted that the rate of completions needs to increase. ACEC-Ontario supports publishing a monthly, anonymous full bidders list of assignment awards. ACEC-Ontario would like MTO to establish guidance and under what conditions a certain assignment model is selected and make the guidance available. <p>Action – Submit concerns in writing and follow-up with the MTO representatives of the subcommittee.</p>	ACEC-ONTARIO
Nov-23-07	<p>AGENDA ITEM: CONTRACT MANAGEMENT SYSTEM (CMS) UPDATE</p> <p><i>Description:</i></p> <ul style="list-style-type: none"> MTO's Contract Management System (CMS) launched on February 13, 2023. <p><i>Discussion:</i></p> <ul style="list-style-type: none"> MTO has been working to resolve critical issues related to payment, change management, dispute resolution, and integrated apps that are preventing these processes from moving forward. It is anticipated that the November 4, 2023 updates will resolve most of these issues and then focus can be returned to Engineering go live. 	

OPEN ITEMS:	ACTION BY
<ul style="list-style-type: none"> • The 2nd priority is to complete all outstanding scope remaining from the original RFB (reporting, endorsement reports, history functionality, change management, claims, completion. • Between April 18 and October 14, 2023, a total of 17 release notes documents have been issued, outlining a total of 106 changes/fixes/updates to various apps/processes. • Working Groups with stakeholders are being formed in the coming months, to discuss the previous year, improvements and lessons learned. • ACEC-Ontario raised a concern that some contractors are not using CMS, as required by the contract. • WBCMS is planned to be shutdown on November 23, 2023. <p>Actions –</p> <ul style="list-style-type: none"> • #1 – <i>Provide input on items that require training.</i> • #2 – <i>Offered to participate on working groups</i> 	<p>ACEC-ONTARIO ACEC-ONTARIO</p>

NEW ITEMS:		ACTION BY:
Nov-23-08	<p>AGENDA ITEM: GC 3.07.02 ABNORMAL WEATHER UPDATE</p> <p><i>Description:</i></p> <ul style="list-style-type: none"> As part of the MTO General Conditions of Contract (OPSS.PROV 100) update, MTO is considering some changes to GC 3.07.02. <p><i>Discussion:</i></p> <ul style="list-style-type: none"> MTO is considering developing a Standard Special Provision for Abnormal Weather in advance of the roll out of Phase 2 of the GCs update. MTO discussed three key areas of potential edits: <ul style="list-style-type: none"> #1 – create a definition for Calendar Month; #2 – clarification on which weather station data to use when the applicable Environment Canada weather station data is incomplete; #3 - Provide clarification on Abnormal Weather duration and how to assess duration. Changes will be formally communicated through MTO’s Technical Consultation Portal (TCP). <p><i>Action – Item closed.</i></p>	
Nov-23-09	<p>AGENDA ITEM: RFP MODEL FOR CA RETAINER SERVICES ON MAINTENANCE CONTRACTS</p> <p><i>Description:</i></p> <ul style="list-style-type: none"> MTO plans to pilot an RFP retainer for CA / Inspection Services in 3 locations in Area West in 2024 (Chatham, London and Owen Sound). <p><i>Discussion:</i></p> <ul style="list-style-type: none"> MTO presented an outline for a retainer RFP for a pilot project in Area West. The pilot is intended to retain one firm for each retainer services area (Chatham, London and Owen Sound) and will cover construction administration and inspection services (minor capital) and maintenance audit. Proponents will rank their preferred retainer service areas. Procurement to be initiated in winter 2023 with an anticipated start date of early 2024. ACEC-Ontario offered to review the RFP prior to advertising and provide comments on the assignment. <p><i>Action – Item closed.</i></p>	
Nov-23-10	<p>AGENDA ITEM: UPDATE TO SSP199S66 AND CAIS 100</p> <p><i>Description:</i></p> <ul style="list-style-type: none"> SSP199S66 and CAIS 100 will be updated for clarity. 	

NEW ITEMS:	ACTION BY:
<p><i>Discussion:</i></p> <ul style="list-style-type: none"> No changes are being proposed on the administrative side that would impact CA capacity. Changes include: <ul style="list-style-type: none"> Review of scope to include 199S53 requirements that had been previously removed regarding access to records; Clarification of timelines; Separating NCR submission in 2 parts (identification of non-conformance and addressing non-conformance); New definitions for preventive measures and corrective actions. CAIS 100 will be updated to reflect the terminology and timeline changes. Both documents are planned to be posted to MTO’s Technical Consultation Portal (TCP) in January 2024 <p><i>Action – Item closed.</i></p>	
<p>NOV-23-11 AGENDA ITEM: PROPOSED CHANGES TO OPSS 212 EARTH BORROW</p> <p><i>Description:</i></p> <ul style="list-style-type: none"> MTO is proposing changes to comply with the O.Reg. 406/19 On-Site and Excess Soil Management. <p><i>Discussion:</i></p> <ul style="list-style-type: none"> MTO provided an update of proposed changes to OPSS 212 and how those changes will impact the CA. Contractors will give CAs access to the excess soil tracking system. CAs will transmit contractor submission of excess soil documents (if not waived) to MTO Qualified Person (QP) for review. <ul style="list-style-type: none"> Submission of excess soil documents is waived if the earth borrow is produced from ARA sources, MTO infrastructure projects/Class 2 sites operated by MTO. CAs will provide either written consent to deliver excess soil or an Instruction Notice that the requirements have not been met, in consultation with MTO QP. CAs will be required to visit the Source Site and the Working Area to inspect the earth borrow. CAs will supervise and direct sampling. CAs will be required to communicate with MTO QP for decision regarding any visual/olfactory evidence of contamination. ACEC-Ontario noted that, for bidding purposes, firms will need to know the frequency, location and terms of reference for source site visits/inspections. ACEC-Ontario raised concerns about the 28-day turnaround for QP to review contractor submissions and address concerns. 	

NEW ITEMS:		ACTION BY:
	<p>MTO responded that 28 business days should suffice because the initial QP review is estimated to take about 5 days. MTO acknowledges that municipal partners use a 10-day review period. If there are concerns about the submission, such as the need for additional sampling, they can be addressed before the 28th business day. It's worth noting that this specification is in draft, and adjustments to the 28 business days can be made in the specification.</p> <ul style="list-style-type: none"> The revised OPSS 212 will be posted to MTO's Technical Consultation Portal (TCP) providing the opportunity for formal comment. <p><i>Action – Item closed.</i></p>	
NOV-23-12	<p>AGENDA ITEM: EXCESS SOILS REGISTRY</p> <p><i>Description:</i></p> <ul style="list-style-type: none"> MTO's Environmental Policy Office provided clarification on how a project notice is filed within the Excess Soil Registry and who files the notice, when is it required, and what documentation is required. <p><i>Discussion:</i></p> <ul style="list-style-type: none"> NSSP ENVR0014 (February 2023) requires the filing and update of the registry to be completed by the Contractor. If the Contract Documents have the older version of the NSSP, the CA shall issue a change order to the Contractor instructing them to use the February 2023 version of NSSP ENVR0014 and to obtain a price quote from the Contractor to file the notice for the Registry. MTO designated the Manager of Engineering as the Project Leader when filing a notice on the Registry. Through a jurisdictional scan, design consultants are to plan for excess soil management early on in the design. The Contractor, as the Authorized Person, is to file the notice and update the Registry. The Contractor is to provide the CA with the Registry Notice ID and any other documentation required for the Initial Declaration Form. The CA is to forward this information to the CSA. This information will be used for the Initial Declaration form. Once signed by the Project Leader, it will be sent to the CA to be uploaded by the Contractor when filing the notice to the Registry. Registration is through the Excess Soil Registry, Resource Productivity & Recovery Authority (RPRA). <p><i>Action – Item closed.</i></p>	
NOV-23-13	<p>AGENDA ITEM: SUCCESSION MANAGEMENT</p>	

NEW ITEMS:		ACTION BY:
	<p><i>Description:</i></p> <ul style="list-style-type: none"> • Succession management is an item being discussed at the Executive Committee and the Engineering Subcommittee. <p><i>Discussion:</i></p> <ul style="list-style-type: none"> • ACEC-Ontario believes that succession management is important for workforce management, for both ACEC-Ontario and MTO. • A workshop is being planned by the MTO-ACECO Engineering Subcommittee and is planned for early 2024. • It would be beneficial for members from both the Engineering and Contract Administration subcommittees to attend. • Although early in the planning stages, there is value in reviewing the existing language in MTO’s RFP and RFQ templates (Terms of Reference) to assess edits that may support succession management. <p>Action – <i>Provide an update following the workshop.</i></p>	<p>MTO & ACEC- ONTARIO</p>

STANDING ITEMS:		ACTION BY:
Nov-23-14	<p>AGENDA ITEM: TABLING OF ADDITIONAL IN-MEETING ITEMS</p> <p><i>Description:</i></p> <ul style="list-style-type: none"> • ACEC-Ontario raised an issue related to compensation for duplicate work efforts that are occurring for some CMS efforts. <p><i>Discussion:</i></p> <ul style="list-style-type: none"> • ACEC-Ontario noted that there are duplicate work efforts occurring in CMS that have a time and monetary impact on CA firms. • MTO requested that assignment-specific concerns be communicated to the CSA and they will be assessed on a case-by-case basis. • If a CA firm disagrees with the approach on an assignment, then they should quantify additional costs and inform CSA as soon as possible and not wait until the end of the contract. <p><i>Action – Item closed.</i></p>	
Nov-23-15	<p>AGENDA ITEM: FUTURE MEETINGS</p> <ul style="list-style-type: none"> • Meetings for 2024 to be held on: <ul style="list-style-type: none"> • Tuesday March 5, 2024 (1:00pm – 4:00pm) via MS Teams. • Tuesday June 25, 2024 (1:00pm – 4:00pm) via MS Teams. • Tuesday November 5, 2024 (1:00pm – 4:00pm) via MS Teams. 	

INFORMATION SHARED FOR THIS MEETING		
Document Title	Shared By	Format
MTO-ACECO Contract Administration Subcommittee Workplan (June 27, 2023)	MTO	Excel
ACEC CMS Update – November 7, 2023.pdf	MTO	Adobe

WORK PLAN for the CEO-MTO Contract Administration Subcommittee

Team: MTO-ACECO Contract Administration Subcommittee Workplan

Date: November 7, 2023

Updated By: Finlay Buchanan

Item No.	Activity or Deliverable	Ongoing or Project	Issue Elevated to Exec Committee?	Lead	Added to Plan Date	Completion Date	Current Status	Notes
2023-01	CA CPR Pause	Project	Yes	Seyed Tabib	June 27,2023		Ongoing. Exec Com is also interested in updates Reference: June-2023-07 meeting notes	MTO has paused the use of Corporate Performance Rating (CPR) in both the RFP and RFQ bid evaluations in order to implement a more balanced approach, considering the price and quality of work, and the proposed resources. The spread of CPRs across Engineering Service Providers (ESPs) is very small and considering CPR in evaluation is offering little value to MTO in selection of ESPs. Ongoing communication and consultation with stakeholders will support the development of a revised CPR system
2023-02	CAIS Lessons Learned	Ongoing	No	Rebecca Li Chris McBride	June 27,2023		COMPLETED. Reference: June-2023-08 meeting notes	MTO and ACEC Report back - Discussion planned for November 2023 meeting
2023-03	Review training prequalification (succession management)	Project	Yes	Rebecca Li	June 27,2023		Ongoing. Reference: June-2023-02 meeting notes	Consider reducing requirements to allow for development and training in relation to succession management
2023-04	OPSS.PROV 100 (MTO General Conditions of Contract)	Project	No	Rebecca Li	June 27,2023		Ongoing. Reference: June-2023-04 meeting notes	GC technical review underway.

Association of Consulting Engineering Companies (ACEC)

CMS Update

BSS Introduction

- Jamie Lauzon
 - Head, Business Solutions Section
- Ryan McKerracher
 - (A) Head, Business Solutions Section
- Marc Coutu
 - CMS Team Lead
- Helpdesk/Onboarding/Testing/Troubleshooting/Everything Else
 - Katherine Locatelli
 - Olivera Skakic
 - Heather Brown
- Material Lab Testing
 - Eric Donohue
- Engineering Lead
 - James Flanders

Overview

- Engineering go live was paused to allow focus on construction support and roll out, however, much of the functionality and requirements were completed last fall with a CMS Engineering Team of SMEs from across the province
- Currently, one of two main priorities for the development team for the last month, and going forward, has been to stabilize the system
 - Engineering development has continued in parallel to this
- This means solving all outstanding, critical issues relating to Payment, Change Management, Dispute Resolution, or any integrated apps that are preventing these processes from moving forward
 - November 4th updates should solve most of the last of these issues
- This also means no new issues can arise during this stabilization period

Overview

- The second priority has been to complete all outstanding scope remaining from the original RFB requirements, and the scope that has been added, which includes
 - Reporting
 - Enhanced, custom reporting abilities, complete with User Guide
 - Endorsement Report
 - History functionality for all internal MTO users, on all apps
 - Improvements to SOV, including Lump Sum functionality and Unit Price administration
 - Change Management – the ability to add new items [Change Order – Basis of Payment (b)]
 - Additional MLT functionality, including automatic ERS calculations and 27 additional Test Codes
 - 45 in testing right now
 - 27 additional
 - 190 total needed (full scope not included in RFB)
 - Claims Suite (complete with Adjudication app)
 - Completion Suite
 - Design & Construction Issues Tracker (NEW – replaces PCR and DIT)

Overview

Other apps we are currently developing, required to complete and stabilize the solution

Most are updates to current apps, rather than new

No.	Document Title	Document Type	Priority	Status	Submission Date	MTO Response Date	Details of Confirmation Received from MTO
1	Change Proposal - Solution Design 2.0.docx	Specification	1	Accepted	17-Jul-23	07-Sep-23	
2	Change Initiation - Solution Design 1.12.docx	Specification	1	Submitted to MTO	17-Jul-23		
3	Change Order - Solution Design 1.6.docx	Specification	1	Submitted to MTO	17-Jul-23		
4	Reconciliation - Solution Design Spec 1.5.docx	Specification	1	Accepted	01-Sep-23	07-Sep-23	
5	Endorsement Report - Solution Design v1.4.docx	Specification	1	Accepted	27-Jul-23	08-Sep-23	
6	Statement of Working Days - Solution Design Spec 1.5.docx	Specification	2	Accepted	06-Jun-23	07-Sep-23	
7	Compensation Request - Solution Design 2.2.docx	Specification	1	KPMG Revision	23-Aug-23		SDS currently under review
8	Concrete Delivery Ticket SDS 1.6.docx	Specification	2	Accepted	13-Sep-23	14-Sep-23	
9	Contract Completion - Design Spec 1.2.docx	Specification	2	KPMG Revision	13-Jul-23		Updated requirements received from Ryan on 22 Aug. SDS being redeveloped
10	Incident Notification - Solution Design Spec v03.docx	Specification	1	Accepted	17-Aug-23	07-Sep-23	
11	CPR - Solution Design Spec 1.6.docx	Specification	2	Submitted to MTO	25-Sep-23		
12	Contractor Quantities - Solution Design Spec 1.8.docx	Specification	2	Accepted	17-Jul-23	14-Sep-23	
13	Initial Notice - Solution Design Spec 03.docx	Specification	1	Accepted	15-Aug-23	07-Sep-23	
14	DCZ - Solution Design Spec 1.7.docx	Specification	3	Accepted	17-Jul-23	06-Sep-23	
15	File Manager - Solution Design v02.docx	Specification	2	Accepted	01-Sep-23	22-Sep-23	

Overview

Other apps we are currently developing, required to complete and stabilize the solution

Most are updates to current apps, rather than new

16	Liens - Solution Design Spec 1.8.docx	Specification	2	Submitted to MTO	17-Jul-23		SDS to be approved after existing tickets are resolved
17	Material Weight Ticket - Solution Design 1.9.docx	Specification	1	Accepted	17-Jul-23	06-Sep-23	
18	Road Report - Solution Design Spec 1.4.docx	Specification	1	Accepted	17-Jul-23	06-Sep-23	
19	Change Request - Solution Design Spec 1.3.docx	Specification	1	Accepted	30-Jun-23	28-Aug-23	
20	Deficiencies - Solution Design v1.8.docx	Specification	3	Accepted	17-Jul-23	23-Aug-23	
21	Release from Warranty - Solution Design v1.5.docx	Specification	2	Submitted to MTO	20-Sep-23		
22	Meeting Minutes - Solution Design 1.6.docx	Specification	3	Accepted	17-Jul-23	23-Aug-23	
23	Turnover Agreement - Solution Design Spec 1.5.docx	Specification	2	Accepted	17-Jul-23	23-Aug-23	
24	MTO CMS ROSTER - Solution Design 1.7.docx	Specification	3	Accepted	17-Jul-23	21-Aug-23	
25	Non Conformance Report (NCR) - Solution Design v11.docx	Specification	2	Accepted	13-Sep-23	14-Sep-23	
26	Diary - Solution Design Spec 1.12.docx	Specification	2	Accepted	26-Jul-23	14-Sep-23	
27	Adjudication - Solution Design Spec 1.4.docx	Specification	1	Accepted	31-Jul-23	17-Aug-23	
28	Performance Appraisal - Solution Design v01.docx	Specification	1	Accepted	25-Aug-23	30-Aug-23	
32	MTO CMS DOFMA - Solution Design 1.7.docx	Specification	1	Accepted	31-Aug-23	14-Sep-23	
35	Claim Category - Solution Design Spec 01.docx	Specification	2	Submitted to MTO	22-Sep-23		
36	Submittal Items - Solution Design 2.0	Specification	2	Submitted to MTO	22-Sep-23		
37	Submittal Packages - Solution Design 2.0	Specification	2	Submitted to MTO	22-Sep-23		
38	Change Management - Solution Design v 1.1.docx	Specification	2	Submitted to MTO	22-Sep-23		Meeting with MTO on 27 Sep for updating requirements

Recent, Significant Releases

Application	Comments
Transactions/Contractor Quantities/Pay Statements	Fixed labelling issue for LS migrated items on the SOV, allowing users to identify them and subsequently post and pay them
MIT Functionality	MISX and Mix Designs app are live. providing base functionality
<p>R5.1 Deployment - Major business updates to DOFMA, Contracts (types) and Project Rosters.</p> <p>Compensation Request, Change Proposal, Change Initiation and Change Order</p>	<ul style="list-style-type: none"> - Updated all DOFMA-related items to the new, two-tiered framework that incorporated both Absolute and Financial thresholds. - Completed construction of all 7 contract types in CMS - Completed updates to project rosters on all contracts, either completing them or updating to improve <p>This includes updates to inputs grids, user interfaces, workflows and logic for all these DOFMA-related apps</p>
Change Management	\$0 Approval WF corrected on Change Initiation, Change Order and Change Proposal apps, for Major Capital and Preservation Capital
Platform/System Updates	Updates to various app and system configurations to fixed issues experienced by users, when resolutions to the issues are determined and code changes are required

Release Notes and Changes

- A total of 17 Release Notes documents have been communicated globally between April 18 and October 14 of this year
 - Average of 1 Release Note document per week, issued weekly through the summer, then bi-weekly in the fall
 - A significant update is planned when a large bunch of updated and new configuration is confirmed to have been deployed this weekend
- Since April 14, there have been 106 changes/fixes/updates to various apps
- All have been recorded and communicated through the Monday Morning Email Blast (MMEB) and (now) CMS Updates
- These updates go to every licensed user in CMS, based on a report run the day of each communication

Plans to Improve

- Further improvements planned...
 - Invoices (adding CSTs and AMCs)
 - Tweaking “MTO-Only” sections
 - Enhancing Approvals process, grids and tracking
 - Forecast Report
 - Various enhancements to what we have functioning now, that will improve usability for MTO and external service providers
 - Improving format and usability of migrated WBCMS files for all users
- Working Groups with stakeholders are being formed in the coming months, to discuss the year in review with CMS, improvements, lessons learned, etc.
 - MTO Internal (diverse roles from throughout Construction office)
 - ACEC (formerly CIO)
 - ORBA
 - (possibly) separate MLT group with the labs

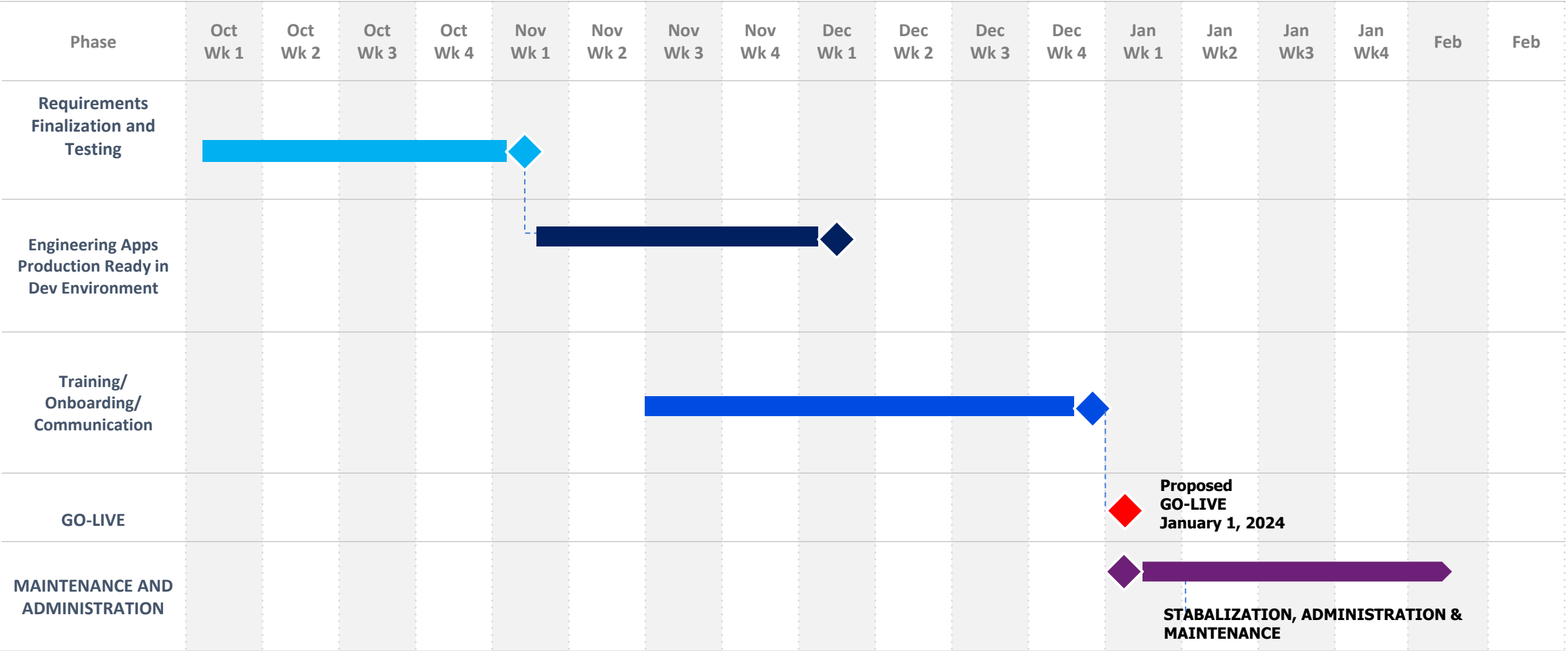
Business Improvements

- DOFMA2
 - Updated DOFMA framework
 - Updates to the input grids on DOFMA-related processes to accommodate the Financial Value, as well
- New Performance Appraisal (Engineering)
- Potential for a more integrated CPR process once the new business is refined
 - Automate Form B Aggregation into appropriate fields
 - New reportability based on the new Form B structure
- Road Report has been expanded to accommodate OO Permits, has been automated and integrated into the system
- Verification Notices has been crated to accommodate all the Certifications and Requests on projects (formerly QVE process)

Business Improvements

- Project collaboration should improve with Engineering on board
- CRs/IRs can be send internally within CMS, to the design PM (Project Delivery)
- As the Engineering SPs are also in the system, they can review/collaborate/respond within the system, in a timely manner
- Alternative Delivery contracts should also see benefits with the entirety of the project, and its members, working within one system from beginning to end
- Another example is the new Design & Construction Issue Tracker (DCIT)
 - Formerly the DIT and PCR
 - Will start in Engineering, record risks, issues, lessons, etc. then flow to Construction
 - Construction will continue to populate it, commenting on Engineering items, adding their own, and filing out the Construction portion (the PCR)

CMS Engineering Roll Out Schedule



Engineering Requirements and Testing (August)

- Engineering functionality is less complex,
 - Similarities with CA assignments
 - Shared or similar applications
 - No data migration from an existing system
 - Less complicated new contract integration
 - Gradual addition of contracts and users
- Majority of discovery and development for engineering was substantially completed prior to construction go live. Engineering CMS team meet weekly for several months to discuss requirements
- Flexible and robust CMS Submittals Application will deliver majority of core functionality for engineering
- Full UAT testing of engineering contracts will be completed in September with the CMS Team, Engineering Team and a few Engineering Service Providers will be brought in for demonstration and feedback purposes

WBCMS Sunsetting

- WBCMS is currently planned to be shutdown November 23, 2023
- All migrations and extractions have been completed
 - Aurigo has produced PDF copies of every record, in every contract, stored internally on MTO SharePoint
 - Files have been migrated from WBCMS into CMS
- It is acknowledged that the format and condition of some of the migrated files are not ideal. More work is planned to consolidate and better organize the files that were segmented due to migration activities

Questions?