

Project Excellence Initiative

1/12/2026

Agenda

1. Project Excellence Initiative – Overview

- Goals
- Tools
- Activities
- Strategies

2. Tools & Systems – Details

- Project Updates & Dashboard
- Procore

3. Board Metrics

4. 2025 Summary

5. 2026 Goals

1. Project Excellence Initiative

Project Excellence Initiative - Started June 2023

Goals

- Understand and improve project health
- Track project performance: *Scope, Schedule, Budget, Quality, Results*
- Place spotlight on project health / focus on corrective action
- Support Project Managers: *provide guidance, intervene when needed*
- Reduce surprises and address issues early

Tools

- Munis – Project financials
- Microsoft List & Power BI – Dashboard reporting on project status
- Procore – Project management / construction management software
- Schedule Template (Envision) – Requirement for all projects

Project Excellence Initiative - Started June 2023

Accountability Discussions

- Monthly meetings with engineering & asset management team members
- Monthly meetings with primary consultants
- As needed meetings with contractors

New Strategies

- Pre-purchase of equipment
- Co-Stars contracting

2. Tools & Systems

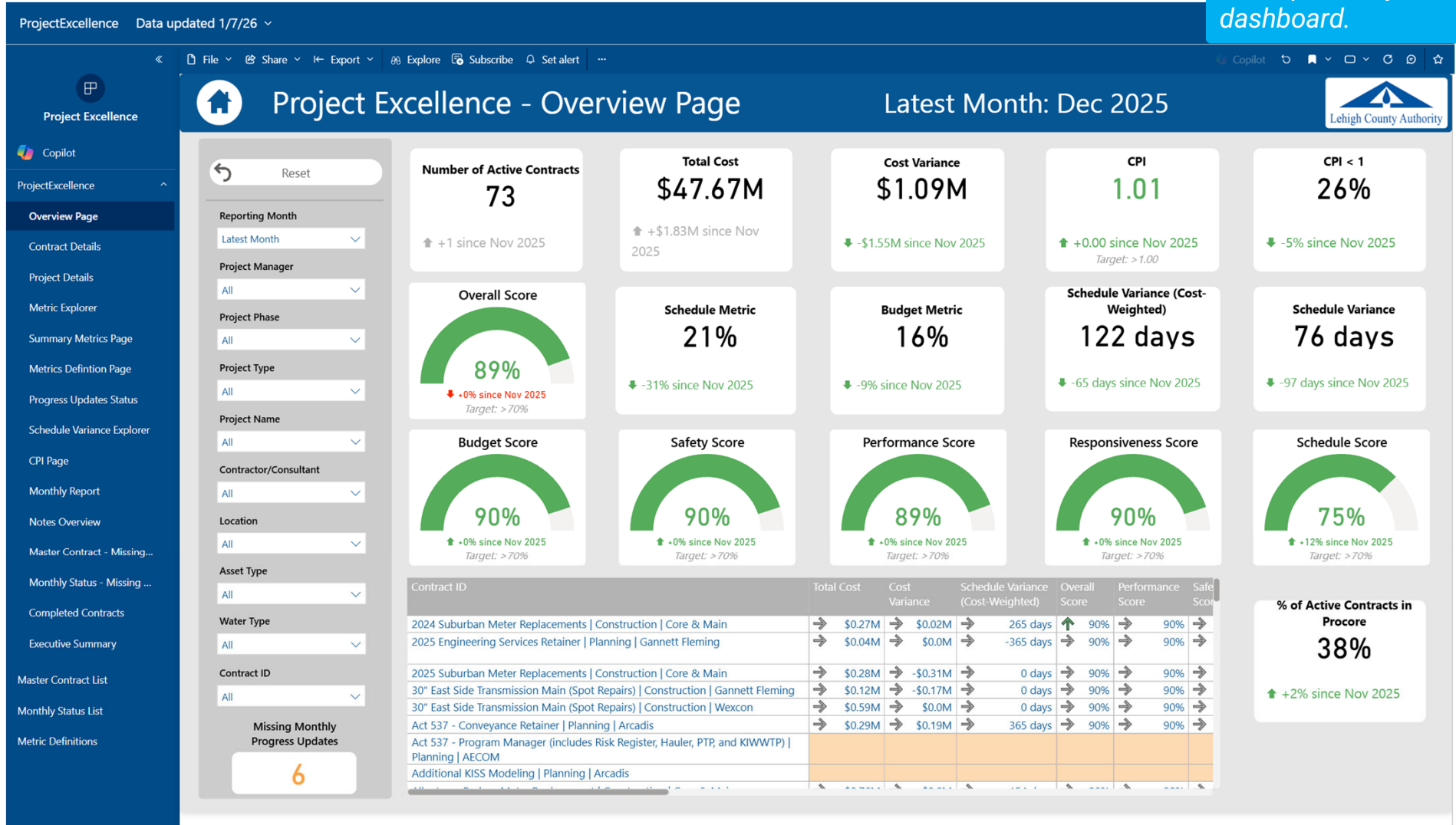
Monthly Project Status Updates (MS List)

Contract ID	Project Manager	Contractor/Consu...	Reporting Month	Month-Year	Notes/Roadblocks	Corrective Action...	Corrective Action...	Total Cost To Date	Estimated Compl...	Original Completi...	Estimate at Comp...	% Completed	Performance
Regional Act 537 Plan Preparation Planning ARRO	Philip M. DePoe	ARRO	2/1/2025	February 2025	2/25/25 = "60 day lookahead" underway	NO CHANGE; First draft = end of April 2024? end of May 2024? PNDI/PHMC clearances	having trouble getting started again...EVERY FINAL REPORT = INCLUDE IN THE APPENDIX; EARLY DRAFT DEADLINE = CREATE THIS...MEET IN PERSON	\$211,277.83	12/31/2025	12/31/2025	\$276,090.00	77%	90%
Act 537 - Program Manager (includes Risk Register, Hauler, PTP, and KIWWTPI) Planning AECOM	Philip M. DePoe	AECOM	2/1/2025	February 2025	2/25/25 = reviewing draft term sheet, reviewing draft commitments, reviewing 120/275 case precedence. Running 20-year flow data at the plant (statistics); AJ to send draft 537 next week?	Ask Amy about CEPT at Bethlehem; RISK REGISTER PROPOSAL WAS GIVEN TO LCA...WE NEED ONE BIG PTP DOCUMENT FROM THEM...ONE MEETING WITH AECOM + AJ	FINAL BIOACTIFLO PACKAGE (BRIAN WANTS IT); PTP ECONOMIC ANALYSIS; MICROTUNNEL STUDY = COMPLETED	\$1,335,176.23	12/31/2025	12/31/2025	\$1,411,206.00	95%	90%
SBM Data Analytics Planning Arcadis	Philip M. DePoe	Arcadis	2/1/2025	February 2025	2/25/25 = need Chris M. to contact each Signatory about data collecting (if and when this comes to fruition)	INTERIM 537 COMMITMENT TO ADDRESS (METER DATA ISSUES, ANALYZING THE DATA, CENTRALIZED DATA COLLECTION)	WAIT FOR THE AGREEMENTS TO CHANGE SO LCA CAN TAKE OVER SBM OWNERSHIP; NEED A "FINANCIAL SIDE ANALYSIS"? WAITING FOR FEEDBACK FROM THE SIGNATORIES	\$21,971.82	12/31/2025	12/31/2020	\$80,000.00	29%	50%
City MH Inspections Phase 1 Planning Arcadis	Jason M. Peters	Arcadis	2/1/2025	February 2025	Phil to talk to Matt; Arcadis will do the "first rehab package". Matt to schedule meeting with field services to talk about design package. 01/30/24-Package to be completed in February. Arcadis provided an update on 2/22/24 and reported 1,144 Manholes have been inspected to date. 02/27/24-Mike Bell	07/03/24 Aj to set up monthly meetings with Shelton on all Arcadis work 08/05/2024-Matt to double check total manholes in the scope and check for percentage that are complete. Matt to determine what the City's overall goals for the work. 10/08/24-Matt to meet with Phil to determine what our	Phil needs to talk to Matt again	\$315,917.27	6/30/2025	12/1/2025	\$473,700.00	60%	90%

Project managers update key project performance data monthly.

Overview Dashboard

Power BI analyzes data and reports key metrics in dashboard.



Metric Explorer

Metric Explorer page allows comparison of All Projects. Here total cost is shown.

ProjectExcellence Data updated 1/7/26

File Share Export Explore Subscribe Set alert

Project Excellence

Copilot

ProjectExcellence

Overview Page

Contract Details

Project Details

Metric Explorer

Summary Metrics Page

Metrics Definition Page

Progress Updates Status

Schedule Variance Explorer

CPI Page

Monthly Report

Notes Overview

Master Contract - Missing...

Monthly Status - Missing ...

Completed Contracts

Executive Summary

Master Contract List

Monthly Status List

Metric Definitions

Metric Explorer

Total Cost

\$49M

Reset

Reporting Month

Latest Month

Project Manager

All

Project Phase

All

Project Type

All

Project Name

All

Contractor/Consultant

All

Location

All

Asset Type

All

Water Type

All

Contract ID

All

Total Cost by Project Manager

- Amy Rohrbach \$23.51M
- Anton Siekmann \$10.14M
- Jason M. Peters \$6.17M
- Stephen D. Boone \$2.91M
- Charles E. Volk \$2.60M
- Amy L. Kunkel \$2.06M
- Philip M. DePoe \$1.78M

Total Cost by Project Phase

- Construction \$39.75M
- Planning \$5.02M
- Design \$4.39M

Total Cost by Project Type

- CPA \$37.46M
- PSA \$11.69M
- Not Ident... \$0.00M

Total Cost by Contractor/Consultant

- Eastern En... \$9.96M
- Philips Bros \$6.10M
- Joao & Br... \$4.55M
- HydroVac ... \$4.38M
- Vortex \$3.78M
- Arcadis \$3.59M
- AECOM \$2.91M
- Allan Mye... \$2.45M

Total Cost by Project Name


- WFP Filter Upgrades Construction \$7.92M
- KIWWTP Switchgear & Substation No. 1 Replacement \$6.34M
- Allentown lead service line replacement program Cycle... \$4.55M
- Allentown lead service line replacement program Cycle... \$4.38M
- KIWWTP Final Settling Tanks 1 Through 4 \$3.67M
- SSES Trout Creek & Eastside Basins \$2.64M
- SRP Year 1 City 18d Program \$2.49M
- KIWWTP PMTF Rehab \$2.45M

Contract ID	Project Manager	Selected Metric	Approval Date	Estimated Completion Date	Estimate at Completion Amount	Original Budget
WFP Filter Upgrades Construction - GC Contract Construction Eastern Environmental Contractors, Inc.	Amy Rohrbach	\$6.97M	1/24/2024	9/30/2027	\$6,968,600	\$6,968,600
KIWWTP Switchgear & Substation No. 1 Replacement - EC Contract Construction Philips Bros	Amy Rohrbach	\$5.21M	2/1/2024	5/18/2026	\$5,207,049.7	\$4,974,999
Allentown lead service line replacement program Cycle 2 Contract A Construction Joao &	Anton Siekmann	\$4.55M	11/10/2025	1/31/2028	\$4,546,280	\$4,546,280

Completed Contracts



Notes Overview

 Reset

- Reporting Month** ▼
 ▼
- Project Manager** ▼
 ▼
- Project Phase** ▼
 ▼
- Project Type** ▼
 ▼
- Project Name** ▼
 ▼
- Contractor/Consultant** ▼
 ▼
- Location** ▼
 ▼
- Asset Type** ▼
 ▼

Contract ID	Project Manager	Year-Month	Notes/Roadblocks
Sand Spring WWTP Capacity Rerate Study Planning AECOM	Charles E. Volk	Dec 2025	Task 1 flow and loading projections memo received 12/2. Call with AECOM on 12/4 to discuss.
2024 Suburban Meter Replacements Construction Core & Main	Amy L. Kunkel	Nov 2025	Set up mtg. w/ customer care for compliance.
2025 Engineering Services Retainer Planning Gannett Fleming	Amy L. Kunkel	Nov 2025	
2025 Suburban Meter Replacements Construction Core & Main	Amy L. Kunkel	Nov 2025	Work progressing
30" East Side Transmission Main (Spot Repairs) Construction Gannett Fleming	Jason M. Peters	Nov 2025	Gannett Fleming continues to work closely with our contractor Wexcon. At present date Wexcon anticipates beginning construction in February 2026. This anticipated construction let schedule has been shared with the water filtration plant and field services management. Once Gannett Fleming and LCA receive a firm schedule from Wexcon the updated schedule will be shared and a meeting will be held with the LCA team regarding project wide shutdowns and coordination efforts.
30" East Side Transmission Main (Spot Repairs) Construction Wexcon	Jason M. Peters	Nov 2025	As of 11/24/25 Wexcon continues to tentatively plan to begin construction related activities in February 2026 as per discussions with GFT staff. Wexcon has formally been requested to submit a formal schedule so our field services staff can be informed of all planned work so as to facilitate any assistance .
Act 537 - Conveyance Retainer Planning Arcadis	Philip M. DePoe	Nov 2025	miscellaneous items as needed
Act 537 - Program Manager (includes Risk Register, Hauler, PTP, and KIWWTP) Planning AECOM	Philip M. DePoe	Nov 2025	miscellaneous items as needed
Additional KISS Modeling Planning Arcadis	Philip M. DePoe	Nov 2025	PTP/BBC/FEB modeling; theoretical I&I reduction exercise --> both are coming soon
Allentown Badger Meter Replacement Construction Core & Main	Amy L. Kunkel	Nov 2025	Meet w/ customer care.
Allentown Large Valve Replacement Project Construction Joao & Bradley	Charles E. Volk	Nov 2025	Project was substantially completed on 11/14/25 and transmission main restored to full service. City paving ordinance (full lane width) may be activated for patches on S.12th St and MLK Dr.
Allentown Large Valve Replacement Project Design Gannett Fleming	Charles E. Volk	Nov 2025	See notes under contractor. Project is substantially complete.

Notes Overview page allows for rapid review of project status.

Procore

- ✓ **Data Management:** single cloud-based location for all project files with remote application access from devices, such as a smart phone
- ✓ **Communication Tool:** solicit, track, document comments among LCA staff, and stakeholders with tiered seat access with upward and downward scalability based on the needs
- ✓ **Construction & Inspection Management:** efficient clearing house for design drawings, specs, contract, shop drawings, RFIs, pay requests, change orders, field reports, daily bid item tracking, etc.
- ⌚ **Overall Financial and Schedule Management:** dashboard to track and manage at a glance the health of the projects.
- ⌚ **Integration:** ability to integrate with our existing software platforms including Microsoft SharePoint, Teams and Office, ESRI's GIS, Cityworks CMMS and Tyler Munis Enterprise
- ⌚ **Engineering & Operations Collaboration:** O&M manuals, photo documentation, asset management data, As-built drawings



✓ Complete and Operational

⌚ In Progress

Procore - Shop Drawing Review and Routing

Lehigh County Authority
Lehigh County Authority
50581 - KIWWTP Primary ...
Project Tools
Submittals
Search
Ctrl | K |
★ Favorites

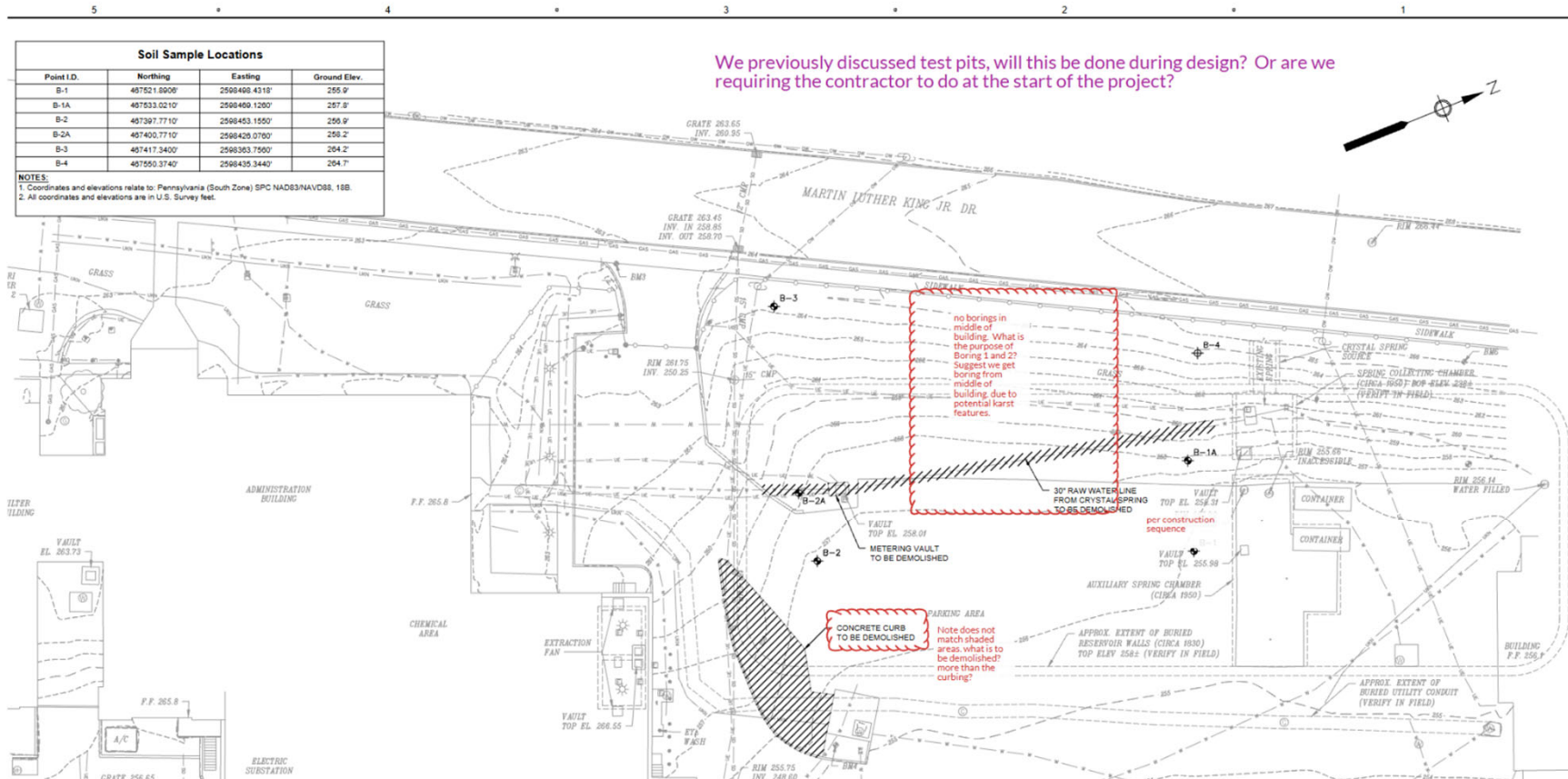
Submittals + Create

Easily create individual submittals or generate them from specifications, and then store and track all steps of the submittal process.

[Items](#)
[Packages](#)
[Spec Sections](#)
[Ball In Court](#)
[Recycle Bin](#)

	Spec Section	#	Rev.	Title	Type	Status	Responsible C...	Submit By	Received From	Recei...	Ball In Court	Approvers	Response
<input type="checkbox"/>	40 23 39 - Proc...	40 23 39-...	0	40 23 39-017.0- 54in Wax Tape Products	Product Inf...	Appr...	Allan Myers, L.P.	Select a Date...	Ray George			Andrea Miller David Wodyka Amy Rohrbach	Approved Approved Approved
<input type="checkbox"/>	40 23 39 - Proc...	40 23 39-16	0	40 23 39-016.0- Stainless Steel Mega Press Dra...	Product Inf...	Appr...	Allan Myers, L.P.	Select a Date...	Ray George			Andrea Miller David Wodyka Amy Rohrbach	Approved as Approved as Approved as
<input type="checkbox"/>	40 23 39 - Proc...	40 23 39-15	0	40 23 39-015.0- Restrained Flanged Adapters a...	Product Inf...	Appr...	Allan Myers, L.P.	Select a Date...	Ray George			Andrea Miller David Wodyka Amy Rohrbach	Approved Approved Approved
<input type="checkbox"/>	40 23 39 - Proc...	40 23 39-14	0	40 23 39-014.0- Stainless Steel Ball Valves	Product Inf...	Appr...	Allan Myers, L.P.	Select a Date...	Ray George			David Wodyka Amy Rohrbach	Approved Approved
<input type="checkbox"/>	40 23 39 - Proc...	40 23 39-13	2	40 23 39-013.2- Flow Meter/ Transmitter	Product Inf...	Appr...	Allan Myers, L.P.	Select a Date...	Ray George			Andrea Miller David Wodyka Amy Rohrbach	Approved as Approved as Approved as
<input type="checkbox"/>	40 23 39 - Proc...	40 23 39-13	1	40 23 39-013.1- Flow Meter/ Transmitter	Product Inf...	Reje...	Allan Myers, L.P.	Select a Date...	Ray George			David Wodyka	Rejected
<input type="checkbox"/>	40 23 39 - Proc...	40 23 39-13	0	40 23 39-013.0- Flow Meter/ Transmitter	Product Inf...	Revi...	Allan Myers, L.P.	Select a Date...	Ray George			Andrea Miller David Wodyka Amy Rohrbach	Revise and F Revise and F Revise and F
<input type="checkbox"/>	40 23 39 - Proc...	40 23 39-12	0	40 23 39-012.0- Line Stop Materials and Equipm...	Product Inf...	Appr...	Allan Myers, L.P.	Select a Date...	Ray George			Andrea Miller David Wodyka Amy Rohrbach	Approved as Approved as Approved as
<input type="checkbox"/>	40 23 39 - Proc...	40 23 39-...	1	40 23 39-011.1- Temporary Bypass Pumps & Con...	Product Inf...	Void	Allan Myers, L.P.	Select a Date...	Ray George			David Wodyka	Void
<input type="checkbox"/>	40 23 39 - Proc...	40 23 39-...	0	40 23 39-011.0- Temporary Bypass Pumps & Co...	Product Inf...	Revi...	Allan Myers, L.P.	Select a Date...	Ray George			Andrea Miller David Wodyka Amy Rohrbach	Reviewed wi Reviewed wi Reviewed wi
<input type="checkbox"/>	40 23 39 - Proc...	40 23 39-...	0	40 23 39-010.0- Effluent Box Bulkhead	Product Inf...	Void	Allan Myers, L.P.	Select a Date...	Ray George			David Wodyka	Void

Procore - Design Review – Markup Tools – Team Collaboration



AECOM

PROJECT
 Allentown Water Filtration
 Plant Crystal Spring PFAS
 Treatment Facility
 Allentown, PA 18102

CLIENT
 Lehigh County Authority
 1300 Martin Luther King Jr Drive
 Allentown, PA 18102
 610.437.7643 tel
 www.lehighcountyauthority.org


CONSULTANT
 AECOM Technical Services, Inc.
 1635 Market Street, Suite 1000
 Philadelphia, PA 19103
 215.269.4300 tel
 www.aecom.com

CONSULTANTS

30% SUBMITTAL

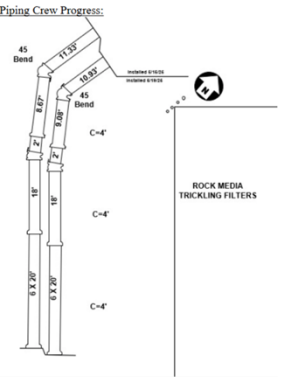
REGISTRATION

Procore – Construction Management – Daily Reports – Photos.

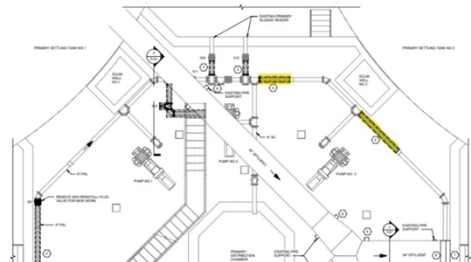
	PROJECT #091132
	DATE: 05/19/2025

CONSTRUCTION OBSERVATION REPORT

Piping Crew Progress:



Mechanical Crew Progress:



V:\Projects\BPA132\Proj1700-799 - Municipal\707 - Lehigh County Authority\707046 - KIWWTP Sludge Line Replacement\Reports\Daily Reports\2025.05.19_Daily Report.doc **Page 3 of 3**



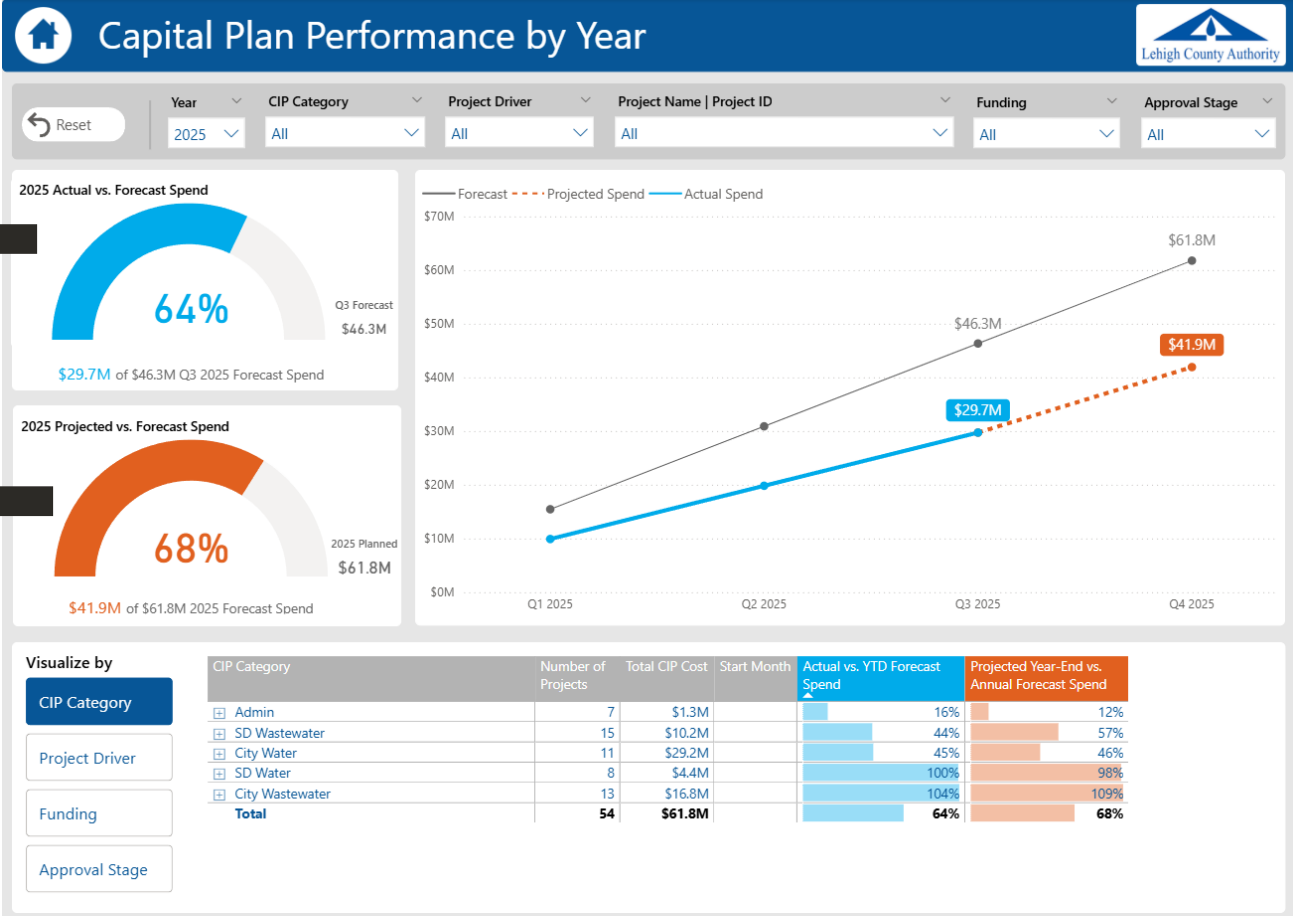
3. Potential Board Metrics for Discussion

Capital Budget Performance by Calendar Year – Quarterly Updates

Present a clear picture of both current financial performance and anticipated year-end outcomes, enabling proactive, data-driven decisions.

Actual vs. Forecast CIP Spend (YTD)
Compares YTD spending against the planned spend for the same period. Provides visibility into whether current expenditures are running ahead of, behind, or aligned with the established forecast.

Projected vs. Forecast CIP Spend
Estimates total spending at year-end based on YTD spending and projected future spending, then compares that projection to the full-year forecast.



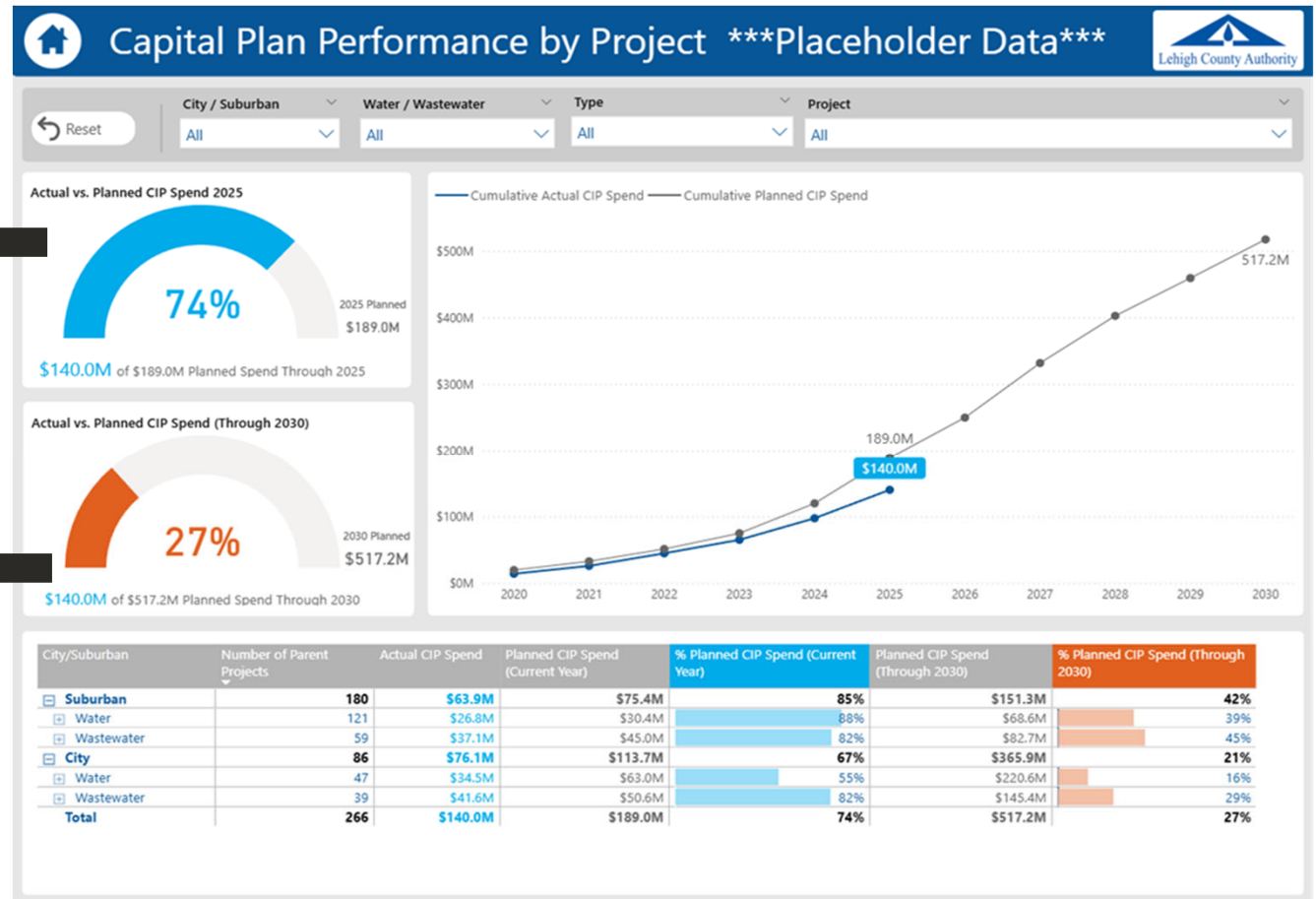
Capital Plan Performance By Overall CIP Program – Quarterly Updates

Actual vs. Planned CIP Spend (To Date)

Compares cumulative actual spending of active CIP projects from 2020 through the current year versus the planned spend using financial reporting / MUNIS data. Indicates whether total CIP expenditures to date are ahead/behind the plan.

Actual vs. Planned CIP Spend (Through Planning Horizon)

Compares cumulative actual spending of active CIP projects from 2020 through the current year versus the full planned CIP investment projected through 2030, combining current MUNIS actuals with current LCA CIP projections. Indicates how much of the long-term capital program has been spent.



Schedule Variance Explorer

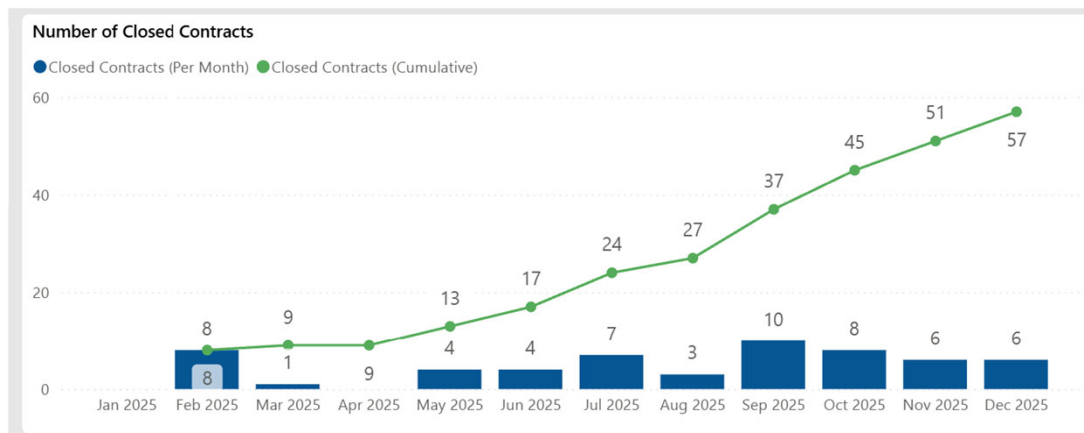
Schedule Variance Explorer shows original vs. current schedule for all projects.



4. 2025 Summary

2025 Summary

- Project Excellence: Fully operational ✓
- Procore: 38% of active contracts in use
- Schedule Management / Capital Budget Schedule
- 2025 Capital Plan Performance: \$46M, 67% of Budget
 - Primary driver for spending gap: Lead Program - Pennvest Bond Issue; Project Delays
- 57 Contracts Completed in 2025:



5. 2026 Goals

2026 Goals

- Develop final project reporting tools for Board & senior management
- Track and improve project schedule performance
- Complete \$62.2M in capital improvements
- 100% projects in Procore / 100% projects using schedule template
- Integrate Munis data into Project Excellence dashboards
- Project Management Institute Training

Discussion?
Thank you!