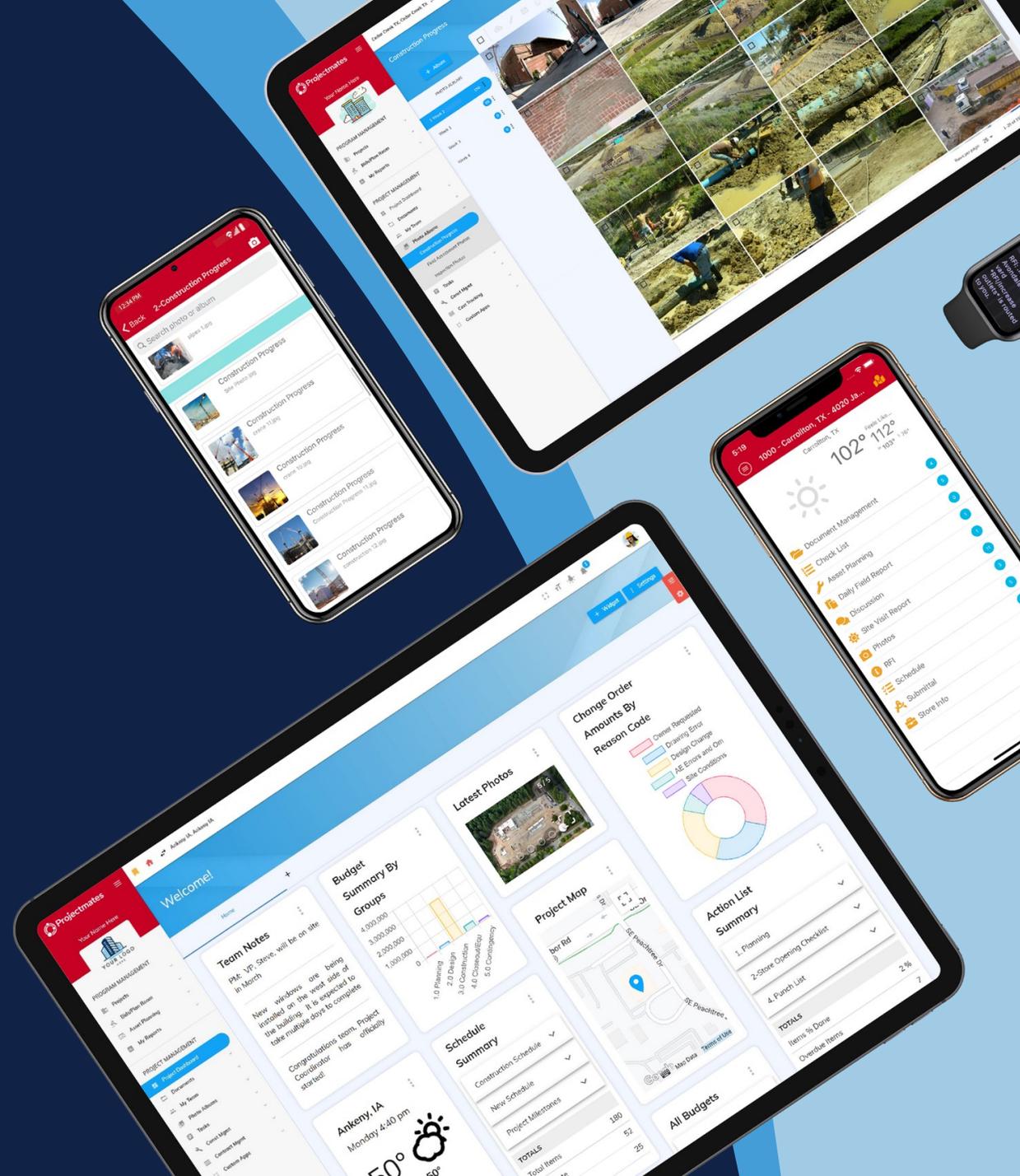




# Aligning Budgets with Big Goals:

Capital Planning for Owners

**LIVE** EVENT



# Meet Your Speakers



**Jamie Rogers**

Senior Project Manager



**Marcus Bliss, PMP,  
CSM, CMIT**

Vice President

# Today's Learning Objectives

1. Is More Tech Better?
2. An Owner's Conversation
3. Prioritizing For Long-Term impact

# Receiving Credit from Today's Stream



**Approved  
Continuing  
Education**

Be sure to watch today's full session to see how you can earn your credit.

# Technology's Role In Capital Planning

- **No shortage of “solutions”**
- **Capital planning isn't just about managing projects**
- **Choices really matter**



# The Over-Tooling Owner

- More tech instead of more intentionality

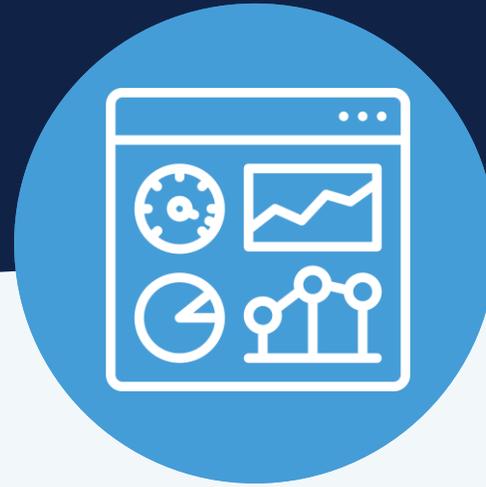
- Duct-taped solutions



# The Hesitant Owner



Cost and  
Complexity



Inertia and  
Resources



Leadership  
Support

# Why These Methods Break

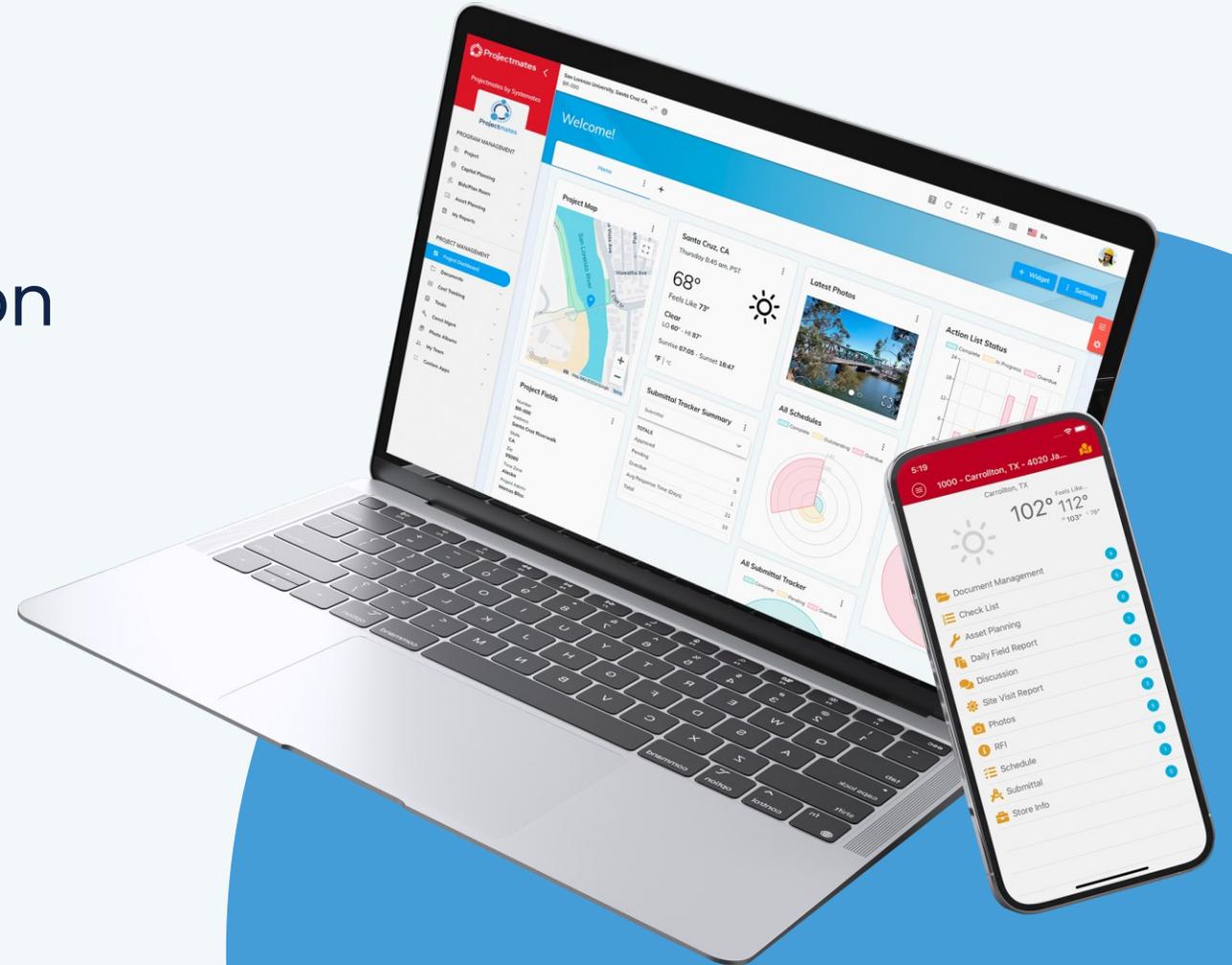
- Version chaos across teams
- Context buried in email
- Funds tracked in silos
- Reporting lag and rework
- Risk signals arrive too late



# The Integrated Owner



- Project Management Information Systems
  - Streamlined collaboration
  - Top-tier visibility
  - Data-based decisions
  - ERP & Accounting Integration



# Let's take a poll.

How do you currently manage your rolling capital plan?

A.

Excel/spreadsheets

B.

Integrated capital planning software

C.

Capital planning software that doesn't integrate

D.

We don't use any software for capital planning

# Hear from Will Rose at the City of Newport News





# Capital Planning



Creating capital plan and planning funding for projects



Ranking and prioritizing projects



Establishing planned costs per fiscal year and phase



Project execution

# Best Practices



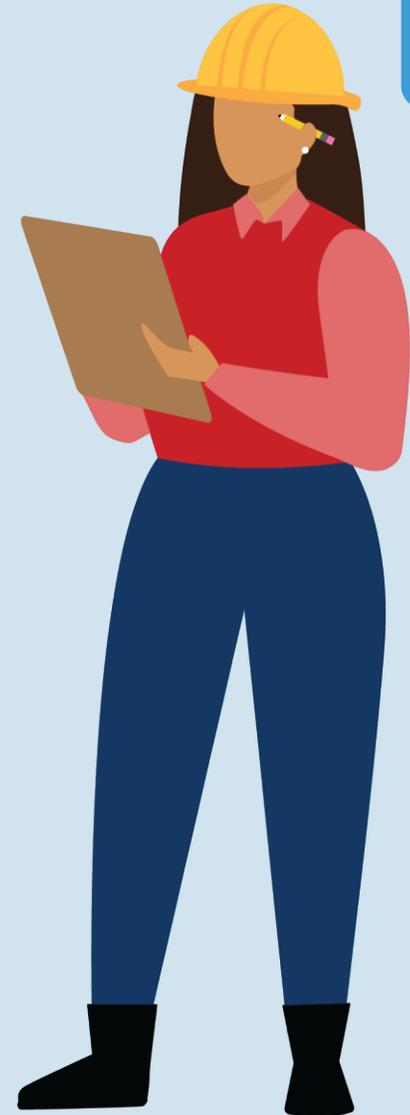
- Consistency is Key

- Prioritize and Fund

- Plan for Reporting

# Time for Q&A

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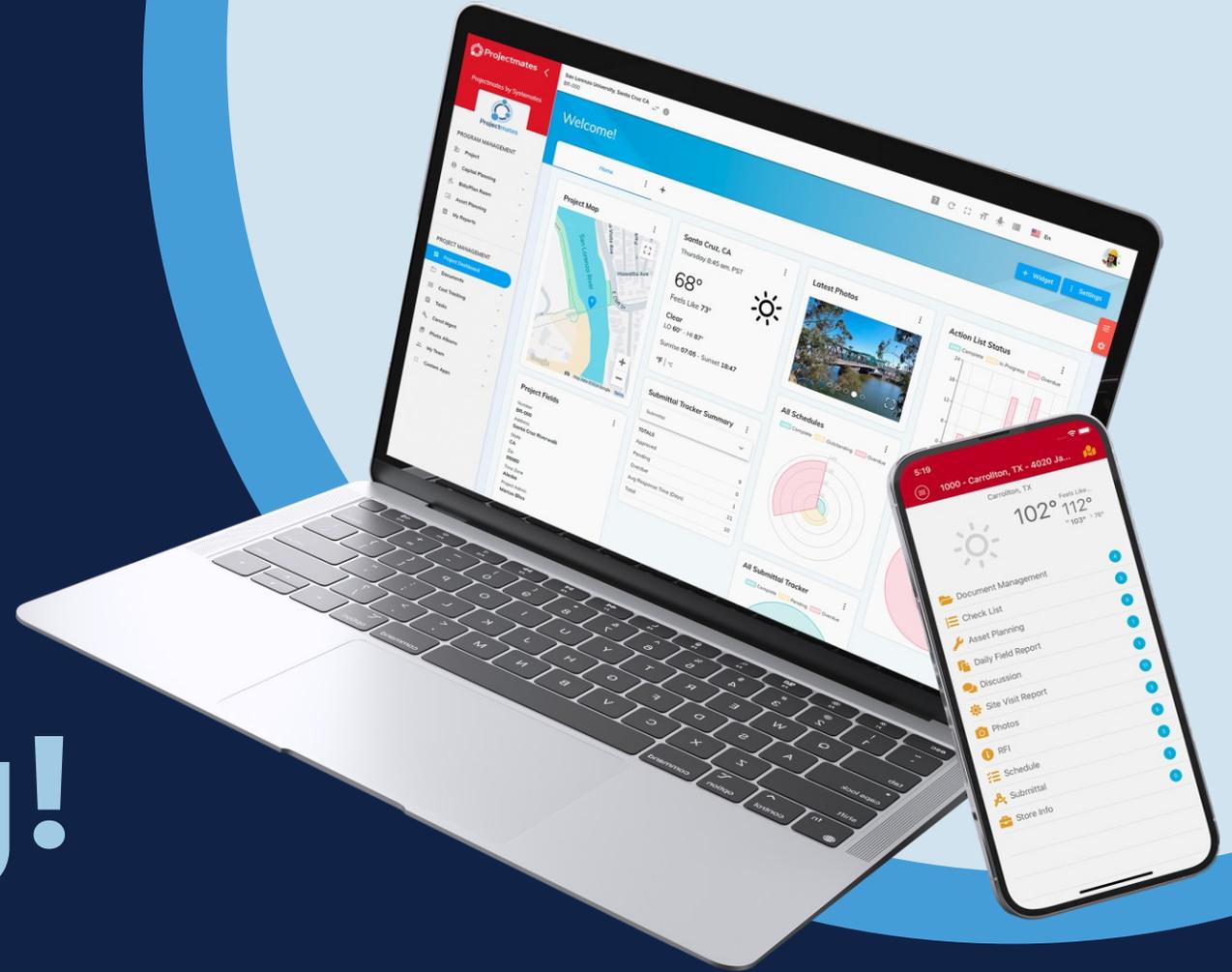
You are eligible to receive AIA credit for today's webinar.

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