Foundations of Project Success:

Part 1 – Comprehensive Planning[1]

Bob Prieto

Introduction

This paper is the first of a three part series that covers three interrelated topics essential for successful management, execution, and delivery of today's engineering and construction projects:

- Comprehensive planning
- Organization, and
- Governance

Each of these topics could be an extended paper in their own right, but in this series we will touch on many of the aspects of each but know there is much more to each aspect. This series is driven in part by a recognition that later, larger problems on projects can trace their roots back to foundational activities that either have not been sufficiently thought through or in some case not even really considered.

The papers in this series are drawn from a script for a class the author previously taught, so the style is conversational.

We will begin with comprehensive planning.

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Comprehensive Planning

In this paper we will touch on six aspects of project planning. The comments come from a perspective gained in nearly 50 years of working on, overseeing, and developing turnaround strategies on large, complex mega and giga projects with values up to $25 billion US dollars.

The six aspects of project planning covered are:

- Strategic Business Outcomes/ Strategic Business Objectives (SBO)
- Importance of Project Planning to Project Success
- Lifecycle Planning Process
- Project Planning as a Primary Management Function
- Project Plan
- Agile Planning

Strategic Business Objectives

Strategic Business Objectives (SBOs) represent the fundamental business drivers in a well-executed program.

They also represent the number one reason that large complex projects fail. In addressing the turnaround of 20 "underperforming" large projects there was only one failure mechanism common on all these failing projects. And that was the inability of the top person in the owner's organization to sit across his desk and tell me what the strategic business outcome he wanted to achieve by spending billions of dollars. I am talking about very senior individuals.

In fairness there are three aspects of SBO failure.

The first is the failure to articulate what the SBOs are. Everyone kind of knows but there are slightly different interpretations of what they actually are.

The second aspect of SBO failure is failing to get agreement on them. That agreement includes the owner's board, the senior management team in all elements of the owner's organization, key external stakeholders and of course the main contractors engaged by the owner to achieve these SBOs – his engineer, PMC, and contractors delivering the work.

The third aspect of SBO failure is failing to continuously communicate them to the extended project team. Once is not enough. Many of the people there on day one will be gone at the end of one year and many new people will have been added. They all need to be marching, in unison, together, all the time

SBOs must be truly strategic.

Achievement should result in the transformational outcome that is desired. In this paper we will refer to SBOs as both strategic business objectives and strategic business outcomes. This in part reflects how my experience changed my view over the years but in this paper I will use them interchangeably.

SBOs should describe "Outcomes" and not be confused for strategy or tactics which occur at a different level.

They must be clearly and consistently articulated.

They must be bounded in time.

Open ended SBOs describe a direction or intent, not a rate of progress towards an end goal.

Without adequate bounding, progress is not measurable and ultimate success uncertain.

Bounded strategic business objectives are not enough.

There must be broad stakeholder buy in. Remember that point about getting "agreement" on them.

A lack of consensus acts as a passive drag on many programs.

It's not like people are going in opposite directions but rather small differences in views create unneeded organization friction which builds organizational calluses that impede communication and timely decision making.

The owner's inability to clearly articulate his SBOs creates uncertainty in the foundations of a project. Weak foundations of any kind create the conditions for project failure.

SBOs become more important than requirements and in some instances, projects may be faced with emergent SBOs especially when "influencing flows" cross the semi-permeable project boundary over an extended timeframe. This is an important point. Conventional project management theory says projects are well-bounded. They are not.

Finally, SBOs must be linked with KPIs or progress and achievement cannot be measured. Many large projects measure progress on tangible elements of work but lack the broader view of whether we are achieving what we really wanted to achieve. This is particularly important when soft-goals or time to market considerations are present.

Importance of Project Planning to Project Success

Let's turn now to why project planning is so important to project success.

We've discussed #1 Reason Large Complex Projects Fail

- Failing to clearly articulate the project's SBOs
- Failing to get agreement on them

- Failing to continuously communicate them

But weak pre-project planning is another one of the elements we see in weak project foundations. One tool to help check the readiness of a project is the Project Definition Readiness Index or PDRI.

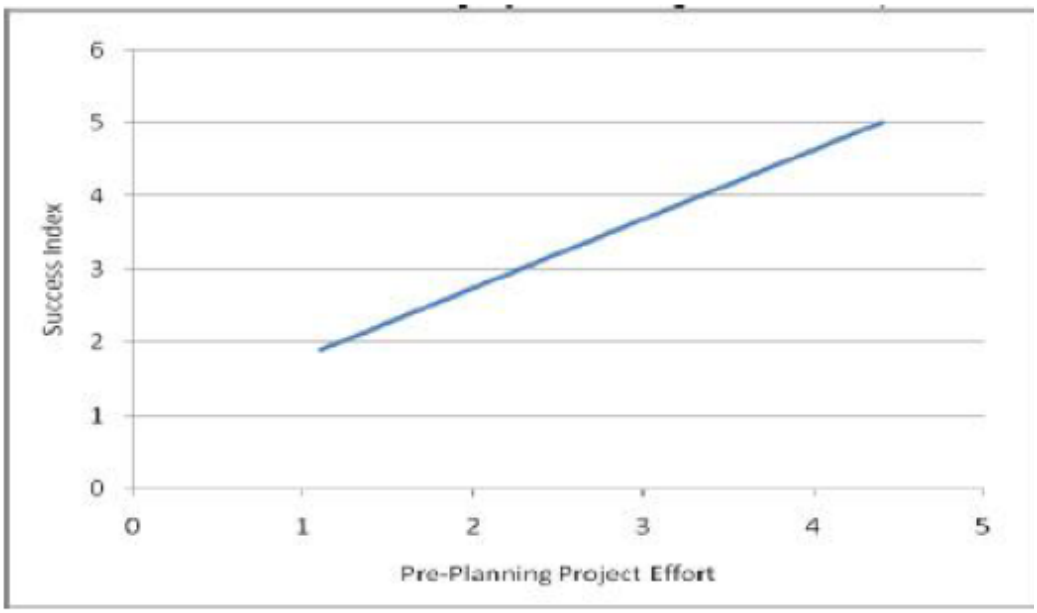


Exhibit 1 - Success Index vs. Pre-project Planning Effort

Project Definition Rating Index (PDRI)
Gibson et. al. 2006

The Project Definition Rating Index (PDRI) is a project scope definition tool developed under the guidance of Construction Industry Institute (CII), that is an easy-to-use tool to measure project scope definition for completeness. PDRI allows a project team to evaluate the completeness of scope definition prior to detailed design or construction and helps a project team to quickly analyze the scope definition package and predict factors that may impact project risk. Extraordinary risks are many times the result of unresolved scope issues or unforeseen conditions.

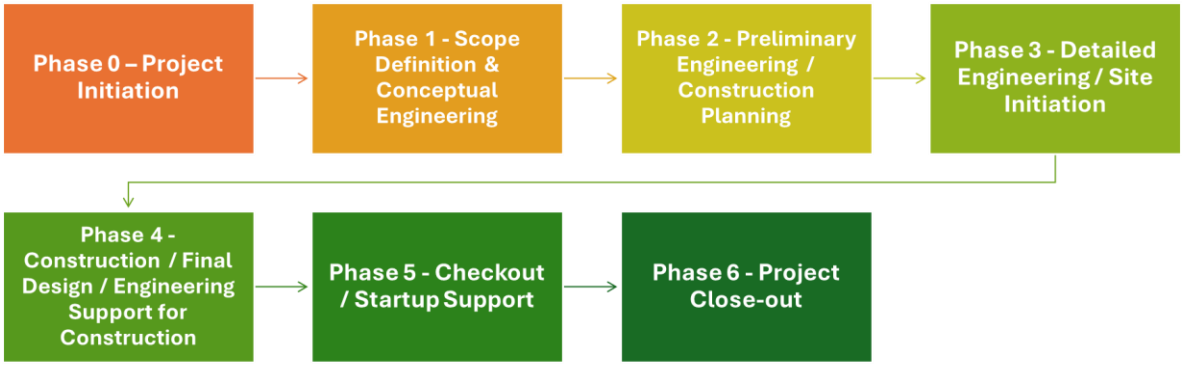
Lifecycle Planning Process

Let's turn now to the lifecycle of the planning process. This is defined as including 7 phases, including:

- Phase 0 – Project Initiation
- Phase 1 - Scope Definition & Conceptual Engineering

- Phase 2 - Preliminary Engineering / Construction Planning
- Phase 3 - Detailed Engineering / Site Initiation
- Phase 4 - Construction / Final Design / Engineering Support for Construction
- Phase 5 - Checkout / Startup Support
- Phase 6 - Project Close-out

Only Phases 0 and 1 are touched upon in this paper.



Phase 0 – Project Initiation

Project Initiation begins at the sales stage, and it may extend to immediately after contract signing. This link between pre-contract and contract is often weak. It is during this handoff where the project baseline is fully aligned with the contract requirements including those elements of the owner's SBO being addressed by the work at hand. Management of a project must be very much focused on this baseline and Baseline Centric Execution has proven its value over the years.

Baseline is initially established in the sales phase. It is finalized on contract execution and the seven major elements of that baseline include:

1. Prime Contract
2. Scope of Work – Prime Baseline Document. Recognize that in effect two scopes of work exist.
    a. Facilities – what is to be designed and constructed
    b. Services – the company's role in delivering those facilities. Understanding what you are not doing is as important as what you are doing since these elements represent important interfaces and potentially constraints in your execution.
3. Project Execution Plan

4. Cost Estimate – This estimate must reflect the "Cost Competitive Engineering & Design" that you built into your bid, but even more. It must also reflect an Expanded Basis of Design (BOD^X) which is really what owner's want. This is often implied in contracts and not adequately addressed in project execution.
5. Management Level Schedule
6. Risk Assessment
7. Commercial Baseline

Let's look at few Phase 0 sample activities to get a better feel for what is involved.

Certain activities begin at Sales Stage. These are then expanded on at contract signing. These include:

- Project Kick-off Meetings both internal & external. Think carefully about who needs to be in these meetings especially from the owner's side. It is not just their PM but also their contracts, legal and even accounts payable leads. Don't assume the owner's organization is fully aligned.
- Project Alignment Meeting initially should occur here and then be conducted in more detailed in Phase 1. The Phase 0 and Phase 1 alignment meetings may be combined. I will DISCUSS THIS FURTHER IN GOVERNANCE
- Project Procedures Manual – The initial PPM should highlight special or unique aspects even as other procedures are being developed. Good company PPM go-by documents are very valuable.
- Project Requirements Checklist – This documents key decisions that have already been made. I have found maintaining this checklist and sharing with the client is a good strategy to capture client driven changes in scope and other requirements.
- Project Execution Plan – This outlines the project's strategic plan and in less detail tactical plans for each project phase. At this stage, an initial mobilization plan should be present in some detail.

Security Considerations, including cybersecurity, an area of increasing concern, should be established in Phase 0

Project Taskforce Organization should be laid out in Phase 0 especially any project startup team that will be used. The use of highly skilled and specialized project startup teams is a highly recommended practice. It helps ensure that the project is well founded.

Reference projects, processes or other existing guidance sources should be laid out here. Will the design be based on a similar project or will a construction execution approach such as preassembly or modularization used on a previous project be repeated here?

As part of Phase 0, certain construction management activities occur. These include:

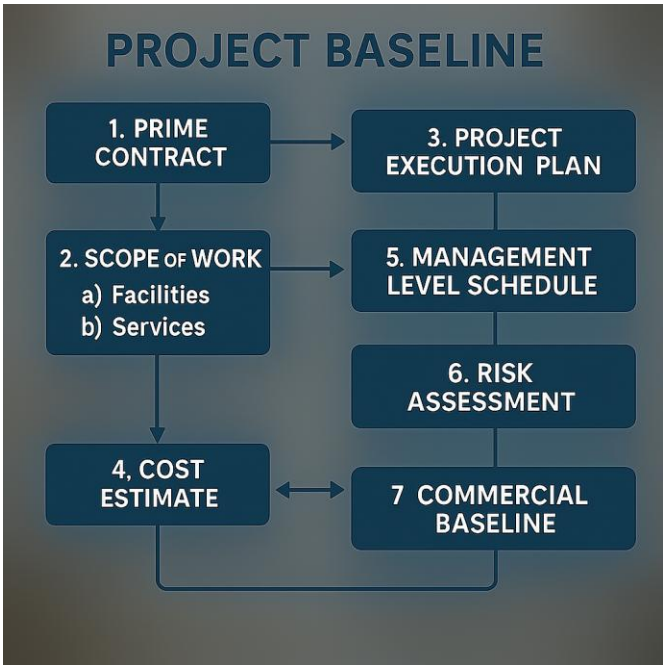
- Construction Execution Plan – This should have been reflected in your proposal and most certainly in your bid cost.
- Constructability Planning – Again this an element of a good construction plan and should have been carefully thought about at the proposal stage and is further refined as part of Phase 0.
- Regional Labor Survey – Do the skills the project requires exist in sufficient quantities in the required project timeframes. In particular are the specialized skills available. In the case of the current market in Saudi, what projects are competing for the same labor? Where will your offshore labor come from? Can you get the required number of visas and how long will it take? If you are sourcing from multiple countries what cross-cultural issues should you anticipate and how do you plan to handle them?
- Licensing – This includes not only any special licenses or approvals you require to undertake the work but also any required technology licenses the owner must obtain and also any technology licenses you may require for various software tools.
- Area Labor Market Analysis – What is going on in the immediate area of your project? What interface, interference or logistical challenges should you anticipate and what is your approach to address them?
- Establish Labor Posture – This is more of an issue in markets with both unionized and non-unionized labor.

Phase 1 - Scope Definition & Conceptual Engineering

Phase 1 begins on Contract Signing. The baseline established during the pre-contract phase is now updated per contract. This baseline is handed off from sales to operations at contract signing and benefits from a formal handover process. The baseline, as discussed previously, includes:

- Prime Contract – all issues and agreements made during negotiation should be documented and communicated to Client and Project Team. A summary is prepared and distributed to all Project Leads
- Scope of Work – This includes both facilities and services
- Project Execution Plan –
    - Project organization established and key roles filled.
    - Project strategy is communicated to all Leads
    - In the Phase 1 Project Execution Plan we select and implement appropriate methods for measurement, analysis and improvement. Don't forget KPIs related to the project's SBOs.

  - The Project Execution Plan or PEP also establishes the Control Structure you will use for the project. One insight to share, think about your control structure and metrics for things outside the project boundary which can wreak havoc on your project. These are those influencing flows mentioned earlier. Project execution is impacted more often than not by what happens away from the project site.
  - Project Procedures Manual or PPM is finalized in Phase 1. The PPM contains detailed instructions that describe how to execute the project scope of work within the specific terms of the contract.
- Cost Estimate – update the cost estimate for what has been learned since the bid. Update it for changes in the market and other externalities. Supply chain staff need to carefully weigh in here. Commodity markets are dynamic and influenced by local, regional and global factors such as conflicts and tariffs.
- Management Level Schedule – make sure this adequately reflects owner reviews and approval time frames. Don't underestimate these. This is a common mistake. Be sure they reflect the team's experience not just what is in the contract.
- Risk Assessment – This must be updated just before contract signing and communicated to all Project Leads
- Commercial Baseline – The commercial alignment process is initiated in Phase 1 and will continue to be refined throughout the project. A commercial summary is communicated to all Project Leads. Everyone must know the true condition of the project.



Phase 1 is foundational for project success. A lot happens at this stage and the amount of effort is often underestimated. This is where a project startup team can bring real value.

Let's look more closely at some of the activities happening at this stage.

Project Alignment is happening in earnest. Often Phase 0 and Phase 1 alignment activities will happen together at this stage.

Alignment in Phase 1 must underscore the project's SBOs

It is also at this stage where we will identify topics for Value Improvement workshops. The value improvement process is important to meeting not only the project's SBOs but also the company's commercial objectives.

The Project Procedures Manual which we began in Phase 0 is completed in Phase 1 and reviewed with the project team. Project's benefit if there is a PPM go-by document to start with.

The PPM must include a well-developed RACI matrix. RACI stands for responsible, accountable, consulted, and informed.

Project Requirements documenting key decisions are prepared in Phase 1 and include:

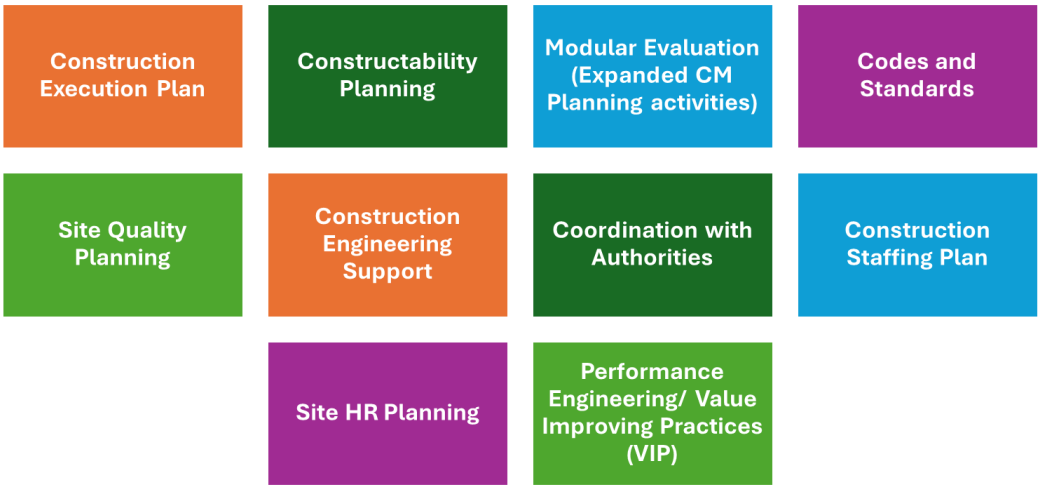
- Safety
- Technical baseline including codes, standards, stamping requirements, approvals
- Use of phased engineering if any
- Quality Activity Plans
- Automated Systems & Tools such as CADD, BIM, and GIS
- Guidelines for input to weekly / monthly/ specialty reports
- Change Management
- Guidelines for use of Job Bulletins, Project Notes, Action Items, Needs Lists, Meeting Minutes
- Material Management process and requirements
- Construction (sub)contracting approach and impact to deliverables
- WBS and impact to deliverables

In Phase 1 we also expand and complete the Project Execution Plan, in particular addressing:

- Early & Enabling work. These are immediate activities and identification of these should have been well developed in Phase 0. For example, rough grading can often begin while final grading plans are being completed.
- Granular approach to permits, utility relocations, actions by others. All too often this is inadequately reflected in the WBS and tie-out to individual construction work packages not made. On one project, 600 utility relocations to be accomplished by 5 different utility

companies based on designs the contractor was to provide was reflected as five activities, one per utility, with start and end dates. This did not support the sequence of relocations the project required. On this turnaround the project was six months along with zero progress on the critical path.

- Approach to modularization, off-site construction. Remember these are other construction sites. Treat them as such.
- Workface planning. This will be covered in other team training sessions.
- Startup Plan. Think "vertical startup." Begin planning startup on the first day of the project to minimize how long it will take along the critical path. What provisions can you build in just by doing something a little different that will facilitate startup?
- Closeout Plan – This is where money you have earned or are entitled to can be easily lost.
- Project Organization – This needs to reflect linkages and interfaces within both the Company and Client organizations. For example, how does the project interface with accounts payable in each organization?



Specific Phase 1 – Construction Management (CM) Activities include:

- Construction Execution Plan – This benefits from any construction management manual or practices the company has but also with any more granular construction handbook, procedures, go-by documents or checklists
- Constructability Planning
- Modular Evaluation – This is an expanded CM Planning activity. Consideration should be given to a separate guide for modular engineering and construction.
- Codes and Standards – make sure that these fully reflect contract requirement including any inspection standards referenced in the contractually required standards. On one project the standard for testing and acceptance, included by reference in a contractually

required standard, changed to reflect later technology for weld inspection. Several hundred million dollars of welds that passed the old standard had to be redone to reflect the changed inspection standard.

- Site Quality Planning
- Construction Engineering Support
- Coordination with Authorities
- Construction Staffing Plan
- Site HR Planning
- Performance Engineering/ Value Improving Practices (VIP). This is a project long effort in my view. Not just a one and done.

Project Planning as a Primary Management Function

Project planning is a primary ,management function. It addresses:

- WHAT – Focus is on the SBOs
- HOW – Revolves around:
    - Available resources - labor (both capability & capacity), material, equipment, information and knowledge;
    - Available means & methods, processes;
    - Stakeholder constraints and policies. This includes the client, your company, regulators and other authorities.

Decisions constitute –

- WHO
- WHEN

The purposes of project planning are:

- Communication
- Staff involved in developing the SBOs into specific strategies and tactics. This reinforces the SBOs, provides one dimension of agreement, and begins the essential continuous communication.
- Information for action is provided to all staff
- Supports creating a well-founded project.
- Addresses:
    - What is required, who should perform it, when it should happen and what decisions have been made or need to be made.

Importantly project planning helps identify what feedback is required to assess and adjust; defines "problems" to be solved; defines goals and objectives:

- This starts with SBO clarity - #1 reason large complex projects fail
- Alternate strategies are also defined and evaluated from the perspectives of schedule, cost, quality, risk

Project Plan

Let's look a little closer at the project plan:

- It consists of project baselines such as those for scope, schedule, cost, and risk
- Supports communication, organizational alignment and resource management
- Guides project execution
- Provides basis for control

A good, well-founded plan is an important first step to a successful project. Elements of a project plan include:

- Project charter
    - Overview of project stating the project's SBOs and describing the underlying reasons and drivers
- Key stakeholders and issues/concerns described
- Statement of Work
- Scope – This is the primary baseline for the project. Don't lose sight of it and understand what is not included as well as what is included.
- Basis of Design may be here – be aware of any expanded basis of design (BOD^X) requirements
- Schedule – deliverables, milestones, review and approval timeframes. This should include any hold period, interim or limited Notice to Proceed (NTP)
- Work Breakdown Structure (WBS)
- Disaggregates scope – phases, subprojects (example: offsite modules), deliverables (including enabling and intermediate), and work packages

Typical sections of Project Plan include:

- Scope management
- Quality management, sometimes as part of scope management
- Risk assessment and risk management plan

- Schedule management – resource loaded schedule; precedences and constraints must be clearly identified
- Resource management including labor, materials, and equipment and associated costs.
- Project organization and RACI Matrix – Responsible, Accountable, Consulted, Informed
- Startup plan and organization
- Stakeholder management
- Interface management. This may be incorporated in scope, schedule, or stakeholder sections)
- Information management, which importantly includes document management, and the project communications plan. Late implementation of document management can create problems throughout the project especially when looking for supporting documentation related to potential changes. Think about document management as a key startup team activity.
- Change management plan
- Start-up and Close-out plans

Project plans provide:

- Flexible, adaptable, iterative approach to deal with change
- High level plans for major deliverables & milestones
- Task start/stop dates limited to only those required. This allows teams to pull work forward:
    - Contingent plans and execution
    - Shifts focus to flows (arrows) vs. tasks
    - Lack of detail when it can be avoided
    - This provides optionality. You commit as late as possible.
- Detailed plans for short periods of time; change as needed. This fosters frequent accomplishments.

Remember, dates are probabilistic ranges vs. deterministic. They are best supported by engaged senior management and a knowledgeable and empowered client. An appropriate contract structure is required.

Explicit feedback helps to improve subsequent periods.

Agile Planning

Agile planning relies on:

- Quality being built in. There is no separate quality assurance phase.

- Data driven decisions
- Kanban methodology is real time communication of capacity
- There is transparency of work underway and upcoming
- Statistical simulations are used

Agile ≠ Scrum.

Scrum is a subset of Agile that relies on a series of sprints. You learn through experiences, self-organize, and continuously improve. Scrum describes a set of meetings, tools, and roles that work in concert to help teams structure and manage their work.

Construction Planning Lessons Learned

Let's look at some construction planning lessons learned:

- Keep projects SBOs front and center. Remember they are the #1 reason projects fail.
- Ensure adequate support and buy-in. That comes with agreement, communication and alignment.
- Document and share insights gained in planning process.
- Document and communicate all decisions made as well as any specific rejections and rationale. This last step recognizes that circumstances may change in the future
- Foster a culture of continuous improvement
- Capture and share lessons learned broadly. Take a look at the National Academy of Construction's Executive Insights on their website.

So what happens if you have poor plans and maybe even more importantly, poor planning? Inevitably you see:

- Schedule delays
- Cost overruns, often flowing from those schedule delays
- Slow adaption to emerging technologies such as the use of BIM, drones, GPS enabled real-time safety and the all popular technology of the moment, artificial intelligence
- Inadequate communication which leads to poor client and team relations and slow decision making
- Labor shortages exacerbated by many competing projects
- Poor planning, forecasts and budgets at later stages
- Disastrous document management
- Cash flow problems. Yes, cash is king. It is a major lubricant in project progress.
- Increased safety risks. Good planning and good safety outcomes go hand in hand.
- Failure to see major risks or so called black elephants.

Conclusion

In this series we will cover three topics.

- Comprehensive Planning
- Organization, and
- Governance

In this paper we looked at Comprehensive Planning. We discussed:

- SBOs. Strategic Business Outcomes or Strategic Business Objectives. If you remember one thing from this paper remember that failing to articulate, get agreement on, and continuously communicate SBOs are the #1 reason large projects fail.
- We discussed the importance of project planning to project success. The foundations have to be strong. Remember, project planning is a primary management function

Delivering mega-scale infrastructure programs demands an integrative approach that begins with unambiguous, time-bounded SBOs and extends through disciplined planning, fit-for-purpose organizational design, and robust governance.

Disclaimer on Use of AI: *In preparing the manuscript, AI-based editorial tools (e.g., Grammarly) were used for grammar refinement, and language models (e.g., ChatGPT or similar) were selectively consulted to explore alternate phrasing and improve clarity. All core ideas, structure, and substantive content are original, derived from the author's professional experience and past presentations. Where relevant, previous materials have been appropriately referenced or adapted.*

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About the Author

Bob Prieto

Chairman & CEO
Strategic Program Management LLC
Jupiter, Florida, USA

Bob Prieto is Chairman & CEO of Strategic Program Management LLC focused on strengthening engineering and construction organizations and improving capital efficiency in large capital construction programs. Previously, Bob was a senior vice president of Fluor, focused on the development, delivery, and turnaround of large, complex projects worldwide across all of the firm's business lines; and Chairman of Parsons Brinckerhoff, where he led growth initiatives throughout his career with the firm.

Bob's board level experience includes Parsons Brinckerhoff (Chairman); Cardno (ASX listed; non-executive director); Mott MacDonald (Independent Member of the Shareholders Committee); and Dar al Riyadh Group (current)

Bob consults with owners of large, complex capital asset programs in the development of programmatic delivery strategies encompassing planning, engineering, procurement, construction, financing, and enterprise asset management. He has assisted engineering and construction organizations to improve their strategy and execution and has served as an executive coach to a new CEO. He is author of eleven books, over 1000 papers and National Academy of Construction Executive Insights, and an inventor on 4 issued patents.

Bob's industry involvement includes the National Academy of Construction and Fellow of the Construction Management Association of America (CMAA). He serves on the New York University Tandon School of Engineering Department of Civil and Urban Engineering Advisory Board and New York University Abu Dhabi Engineering Academic Advisory Council and previously served as a trustee of Polytechnic University. He has served on the Millennium Challenge Corporation Advisory Board and ASCE Industry Leaders Council. He received the ASCE Outstanding Projects and Leaders (OPAL) award in Management (2024). He was appointed as an honorary global advisor for the PM World Journal and Library.

Bob served until 2006 as one of three U.S. presidential appointees to the Asia Pacific Economic Cooperation (APEC) Business Advisory Council (ABAC). He chaired the World Economic Forum's Engineering & Construction Governors and co-chaired the infrastructure task force in New York after 9/11. He can be contacted at rpstrategic@comcast.net.