

PROCUREMENT DAY 2015

NOVOTEL HOTEL & RESORTS
45 The Esplanade, Toronto, ON M5E 1W2



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AGENDA

- 7:30 AM—8:15 AM ➔ Breakfast & Registration
8:30 AM—8:45 AM ➔ Welcome and Introductions

SESSION 1

- 8:45 AM—12:00 PM ➔ Risk Assessment and Analysis Panel
(Panelists include representation by Owners, Contractors, Architects, Lawyers and Insurance Industry)
- 12:00 PM—1:00 PM ➔ Networking Lunch and Group Discussions

SESSION 2

- 1:00 PM—3:30 PM ➔ Prequalification Panel
3:30 PM ➔ Closing Remarks/Wrap-Up

LOCATION

NOVOTEL HOTEL & RESORTS
45 The Esplanade, Toronto, ON M5E 1W2
Tel: 416-860-5187
www.novotel.com

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RISK ASSESSMENT PANEL

The morning segment of this year's Procurement Day will focus on one of the key issues identified as needing to be addressed during the very first Procurement Day: **Risk Assessment and Analysis**.

A common thread of discussion in 2011, and carrying forward in successive years, has been the that each party should responsible for their piece of the project. General consensus was that there are inherent risks that should be allocated and 'owned' by each specific party within a design & construction project. Risk can be broken down into responsibilities and identification of those risk/responsibilities is critical to the success of a project. It is often a difficult process to distill those risks down and identified who is the party that is best able to manage the risk or should manage the risk. It is not necessarily appropriate to transfer risk down the project chain.

Topics for discussion amongst the panel members and delegates will include:

- Whose Risk/Liability is it?
- Identifying Roles and Responsibilities
- Who is best suited to management the Risk?
- Examples of Risk Transfer and analysis – Appropriate or Not Appropriate?
- Impact of the Risk
- Ways in which risk/liability is transferred
- Understanding levels of liability insurance



David Allan joined the City of Barrie team as their Manager of Purchasing in 2008. David has 38 years' experience within the Supply Chain Field (public and private sector), including 21 years serving Canada as a member of the Canadian Forces. David currently is serving as the Director of Professional Relations on the Ontario Public Buyers Association (OPBA) Governing Board.



Catherine DiMarco is partner at the law firm of Heal & Co. LLP, and primarily deals with construction claims and general civil litigation. Catherine is a Section Executive of the Ontario Bar Association Construction and Infrastructure Law Section and a current member and former Director of the Canadian Association of Women in Construction. Most recently, Catherine obtained the Osgoode Certification in Construction Law.



Jill Eagleson is an executive claims consultant for XL Insurance – Design Professional. Jill has been with XLDP and its predecessor, DPIC, for over 19 years and during that time has assisted many architects and engineers across Canada manage risks, prevent losses, resolve claims and employ alternative dispute resolution techniques.



Frank Perricone is founder and President of Percon Construction Inc., a general contracting firm specializing in the industrial, commercial and institutional sector. Frank is a certified Professional Engineer in the province of Ontario and Is Gold Seal Certified. He also serves as a member of the OGCA Board of Directors and Executive Committee.



David Smith is a well-known and respected leader in the surety industry. Mr. Smith has extensive experience in providing surety solutions and capacity for construction companies over the past 32 years. Through partnering with many of Canada's largest contractors, he has gained extensive experience in the P3 sector. He is Senior Vice President and Head of Canadian Surety for The Guarantee Company of North America.



Claudina Sula brings over 28 years of experience in the design and management of a diverse range of projects. In recent years, Claudina has led several projects for Infrastructure Ontario, giving her a comprehensive understanding of the AFP (Alternative Finance and Procurement) Process and DBFM (Design Build Finance and Maintain) delivery models. Currently, Claudina is the Project Leader for the St. Lawrence Market North Building.



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PREQUALIFICATION PANEL

The purpose of prequalification is to ensure that the proponents invited to bid or design the work are capable of delivering quality and value specific to the project requirements.

Prequalification is frequently used for public projects, where the opportunity to be considered as the proponent must be open to all, while at the same time allowing the owner to manage the risks associated with the open tender process.

The owner, through pre-determined criteria, eliminates candidates who do not demonstrate that they have the necessary financial capacity, technical expertise, managerial ability, project success, and relevant experience for the project at hand.

Prequalification also has the potential to simplify the award of the contract process; therefore the prequalification process should be completed prior to the issuance of the tender documents.

The panel of experts will discuss best practices for the prequalification process from a cross section of view points including Owners, Contractors, Architects, Lawyers and Insurance Industry representatives.



Dražen Bulat is a Partner in the Toronto office of Miller Thomson LLP and is the chair of Miller Thomson's National Construction & Infrastructure Group. The focus of Dražen's practice is on the development and drafting of "front end" procurement and construction documents, including tender documents, RFPs and different forms of contracts.



Franklin Holtforster is the founder and president of MHPM Project Managers Inc. Since founding the firm in 1989, MHPM has provided leadership for more than 8,000 projects valued at more than \$10 billion. Major public projects include the Richmond Olympic Oval for the 2010 Olympic Games, CFL stadiums in Ottawa and Hamilton, and renewal of the Parliament Buildings in Ottawa. MHPM employs 400 personnel in 25 offices across Canada.



Serge Massicotte is the president of Massicotte Construction in Ottawa, and has built an excellent reputation in the National Capital Region as a general contractor. As a volunteer, he has been actively involved with industry associations at all levels for more than 20 years, where he has served as Chair of the Ottawa Construction Association, and the Ontario General Contractors Association and the Canadian Construction Association.



Jackie Osti is a Purchasing Coordinator at the County of Wellington and holds a Certified Professional Public Buyer designation. Jackie deals extensively with construction tenders, construction management contracts (CCDC 5B) and contractor prequalification. Jackie serves on the governing board of OPBA for Buyers meetings where current topics concerning public procurement are discussed on a quarterly basis. Jackie has worked in the Public Sector for the last 30 years and she is currently working towards her Canadian Risk Management (CRM) designation.



Emilio Raimondo brings, "Award Winning Design" and over 25 years of experience as a respected and reputable Architect working in the Niagara Peninsula. With a good knowledge of construction, he has been involved in complex projects delivered on time, on budget and more importantly to the satisfaction of his clients. The firm Raimondo & Associates Architects Inc has created buildings of quality and individual character unsurpassed within Niagara.



Richard D. Charron has 31 years of diverse electrical contracting experience, blending management skills and broad technical knowledge, in both union and non-union environments. Demonstrated leadership skills, combined with a bottom-line orientation, in directing complex projects to completion. Adept at analysis and troubleshooting, negotiations, planning and organizing operations and purchasing. He is Owner and President of Anew Electrical Contracting Ltd.



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