



Contract Strategy Virtual Summit

*Traditional and Collaborative Contracting for Owners, Contractors,
Suppliers and Consultants*

June 28-29, 2021

Powered by CII • Supported by COAA and ECI • Produced by Group ASI

Attendance is just \$249 (or less) • Register at go.cii.today/contractsummit



Introduction

The Construction Industry Institute (CII) presents their first-ever Contract Strategy Virtual Summit, focused on exploration of – and recommendations around - traditional and collaborative contracting models for the construction project owner and their contractors and suppliers.



Summit Background

These are influencing factors that informed the decision to create a summit focused on contracting strategy



AWP is a CII best practice; EPC contracting is included the model



The Collaborative Contracting Framework was published and established as a COAA best practice



Partnering / Alliancing is a CII best practice



Integrated Industrial Delivery for Industrial Projects (I2PD) is a current CII research focus with hundreds of pages of research on the topic



The Engineering Construction Industry Training Board has developed a Project Collaboration Toolkit for improving Collaborative Working Agreements

go.cii.today/contractsummit

CII thought leaders

We have an experienced and dedicated team of industry members representing CII



Construction Industry Institute (CII)

Changing How the World Builds



Jay Moser

- CII Board Advisor
- Shell PTE Construction and Fabrication, Global AWP Champion



Eric Crivella

- CII Vice Chair, Advanced Work Packaging Community for Business Advancement
- Digital Construction Works Director, Business Development



Mike Pappas

- CII Associate Director for Deployment
- Independent Industry Consultant



Jamie Gerbrecht

- CII Vice Chair, Advanced Work Packaging Community for Business Advancement
- Former ExxonMobil Principal Construction Engineer, Global Projects (Retired)



Anabella Martin

- CII Vice Chair, Supply Chain Management Community for Business Advancement
- Hilti Business Development and Project Management Professional

Subject matter experts

This team of subject matter experts were assembled to develop and deliver the Summit program



Keith Critzer

ExxonMobil Global Projects
Manager, Methods and Contractor Intelligence

EPC contracts • Keith wrote the chapter in the AWP best practice on traditional contracting



Phil Barutha

Durham School of Architectural Engineering and Construction
Assistant Professor

Partnering and Alliancing • Phil is an academic known for his work in this area. Phil holds a Ph.D. and M.S. in Civil Engineering and Construction, and a B.S. in Construction Engineering.



Alison Bradley

Ontario Power Generation
Director, Asset & Project Management, Southeast Operations, Eastern Region

I2PD • Alison provided procurement support in launching the OPG I2PD pilot project



Richard Venerus

PMP, CCCA, CCM, M.B.A., LL.B.
Venerus Advisory Partners *Founder and Principal*

Collaborative Contracting • Richard was a member of the COAA team that developed the report on Collaborative Contracting



Bruce Burwell

PTAG *Partner, Capital Projects*

I2PD • Bruce is the chair of the I2PD 383 Research Team and implemented I2PD at Ontario Power Generation (OPG). Additional qualifications include PMP and CertAPM.



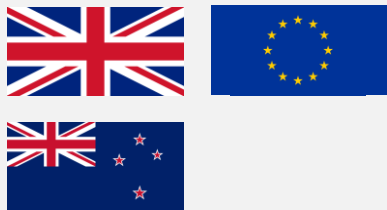
Michael Dubreuil

PTAG *Managing Partner*

I2PD • Mike is providing coaching and facilitative support for the OPG I2PD pilot project

Subject matter experts

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Paul Macgregor

Shell EPC Supplier Relationship Manager
Collaborative Contracting



Tony Maplesden

BSc, CEng, FIMechE, FAPM, FInstLM
Engineering Construction Industry
Training Board *PCT Coordinator*

ECITB PCT • Tony played a significant role in the design and development of the ECITB Project Collaboration Toolkit (PCT) and drafted much of the Toolkit content.



John Fotherby

Kingsfield Academy Founder and Principal
European Construction Institute *Chairman*

John has had over 40 years in the process industries and currently has an influential role advising senior executives and their project teams involved in international engineering and construction projects in the areas of risk management and successful delivery.



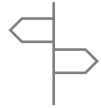
Rod Cameron

SCIRT Former Program Director
(Stronger Christchurch Infrastructure Rebuild Team)

Partnering & Alliances

What Will You Learn About at the Summit?

These are the key topic areas for the Summit



Range of Models

What are the range of contract models available – from traditional to collaborative?



Traditional contracts

What are the traditional contract models?

- Most common are EPC-based
- How do they work?
- What are their strengths?
- What are their weaknesses?
- Available case studies
- Selecting the appropriate model



Collaborative models

What are the collaborative models?

- What are the most common or emerging models?
- How do they work?
- What are their strengths?
- What are their weaknesses?
- Available case studies
- Selecting the appropriate model

Who Should Attend the Summit?

These are the stakeholder groups and professional positions that will most benefit from participating in the Summit.

Positions	Owners/Suppliers - Senior Decision Makers, VPs, PMs, PDs, Field Management CM, Superintendent, Supply Chain Staff, Business Development (Suppliers)
	Consultants (Engineering, Architectural, Accounting, Supply Chain and AWP SMEs)
Purpose	To inform attendees of traditional and non-traditional contracting strategies and approaches. Expand owners' and suppliers' toolkits, make them more aware of their options and benefits. Address how to select the appropriate contracting strategy
AWP Link	AWP is an alignment-based project delivery methodology that could benefit from more collaborative contracting approaches



Overall Objective:

To inform attendees of traditional and non-traditional contracting strategies and approaches and to expand owners' and suppliers' toolkits, making them more aware of their options and benefits. The Summit panelists will explain how to select the appropriate contracting strategy. *The Summit program will be valid for 12 Professional Development Hours (PDHs).*

What to Expect:

Learners are from ALL sectors of the construction industry – not just industrial – and so the focus will be on models relevant to all sectors; learners include SCM & CBA members who will want to understand sourcing methods; many learners will have knowledge of project and compensation models as well as sourcing methods, so the content will go beyond foundations; we will do a deep-dive into the concepts, with a focus on North American and European / British best practices and recommendations.

Day 1 (June 28) • Traditional Contracting (6 hours)

8:00 am Summit Kickoff (Mike Pappas, Anabella Martin, Jay Moser, Eric Crivella and Paul Macgregor)

The panel will discuss the importance of the development of a contract strategy, the use of assessment tools to optimize strategy selection and the importance of leader involvement in the process of strategy design, as well as its connection to the innovative practice of Advanced Work Packaging (AWP).

8:30 am Spectrum of Traditional Contracting Models (Keith Critzer, Richard Venerus and Paul Macgregor)

In this session, panelists will explore the highlights of the various project contracting approaches in use in the construction industry providing a brief and interesting comparison of them by answering key questions such as: What are they? How do they work? When are they most and least appropriate? How are they different from each other? And how to make the best choice among them for a given project situation? They will also explore the main compensation models and their "fit" with each of the main contracting approaches.

9:00 am Break

9:30 am Spectrum of Traditional Contracting Models (continued)

10:30 am Break

11:00 am Considerations when Employing AWP with Traditional and Collaborative Contracting Models

With respect to each approach, Keith Critzer will discuss what modifications/adjustments/enhancements to contractual requirements and plans recommended to enable AWP. Specifically, this section will reflect upon:

- a. Traditional: Design-bid-build (FEED/EPC), Design-build (FEED+EPC); Construction approach: CM, CM-at-risk, direct hire, subcontract
- b. Alternative/Collaborative: Design Competition, Partnering/Alliancing, Industrial Integrated Project Delivery (I2PD)
- c. Compensation: lump sum/fixed price, cost reimbursable, unit rate/time rate, guaranteed maximum price (GMAX)
- d. Contractor Selection: competitively bid or negotiated
- e. Incentivizing/Gainsharing

12:00 pm Lunch break

12:30 pm The Case for Collaborative Approaches (Paul Macgregor)

1:30 PM Break

2:00 pm The COAA Collaborative Contracting Framework (Richard Venerus)

3:00 pm Audience Interaction and Panel Discussion Session with Next Steps
(All CII Thought Leaders and Summit Subject Matter Experts from Day 1).

4:00 pm Day 1 Summit Close

Day 2 (June 29) • Collaborative Contracting (6 hours)

8:00 am Session Kickoff (Mike Pappas, Anabella Martin, Jamie Gerbrecht, Alison Bradley and John Fotherby)

The panel will discuss the importance of collaborative contracting. What is it? Why is it important? What is the connection to AWP?

8:30 am Collaborative Contracting Approaches (Mike Dubreuil)

A deeper dive into collaborative contracting approaches, distinguishing between informal collaboration and collaborative contract approaches. What are the available approaches and why is the Summit focused on Partnering/Alliancing and I2PD?

9:30 am Break

10:00 am Industrial Integrated Project Delivery, or I2PD (Bruce Burwell and Mike Dubreuil)

Industrial Integrated Project Delivery, or I2PD, is a project delivery method that uses high levels of collaboration and integration in the development, design, and construction phases of an industrial project. Research has shown that highly integrated projects can be delivered with faster processing times. Significantly faster delivery times paired with improved quality allow projects to swiftly advance through the development and design phases to the construction phase with enhancements to safety and quality of the project including benefits of early cost, schedule certainty and increased stakeholder satisfaction.

In this session, I2PD will be introduced and discussed. What is this approach? How does it work, where did it come from, when is it most useful, and what are its benefits? Presenters will also discuss selection of the appropriate contract strategy.

11:00 am Break

11:30 am Models - Industrial Integrated Project Delivery (I2PD) Case Study (Alison Bradley and Mike Dubreuil)

Ontario Power Generation (OPG) have implemented a pilot project using the I2PD methodology and they will share their learnings and discuss the potential benefits of future projects.

12:30 pm Lunch Break

1:00 pm ECITB Collaboration Toolkit (John Fotherby and Tony Maplesden)

The Engineering Construction Industry Training Board (ECITB) out of the UK has created a Project Collaboration Toolkit (PCT), which they consider to be the way to collaborate on engineering construction projects. In this session, John and Tony will discuss the PCT and the way in which this influenced the Collaborative Working Agreement (the collaboration contract), as well as the approach taken to transfer the principles of the PCT into the Collaborative Working Agreement (and the structuring of it) so that it is available to a wide range of project types that want to utilize collaborative working.

1:30 pm Partnering/Alliancing (Phil Barutha and Rod Cameron)

The essential difference between a **Partnership and an Alliance** is that a *partnership* is a merger of individual interests for mutual profit, while an *alliance* is a collaboration between sovereign interests for mutual profit. In this session, Partnering and Alliancing will be discussed: What are these approaches? When are they most useful? When should they be used? Examples will be included.

2:30 pm Break

3:00 pm Audience Interaction and Panel Discussion Session with Next Steps

(All CII Thought Leaders and Summit Subject Matter Experts from Day 1 and Day 2).

4:00 pm Summit Close