

PROCUREMENT DAY

April 16, 2012

MEETING REPORT

"Seek first to understand, then be understood."

- Stephen J. Covey

Kingbridge Conference Centre
King City, Ontario

TABLE OF CONTENTS

<i>Welcome and Opening Remarks</i>	2
EXECUTIVE SUMMARY	3 - 6
SCOPING THE ISSUES	7
<i>Key Priority Issues</i>	7
<i>Risk management</i>	8
<i>Evaluation</i>	9
<i>Procurement isolation and lack of knowledge</i>	11
<i>Use of non-standard contracts and supplementary conditions</i>	11
<i>Non-use of standard contracts and use of excessive supplementary conditions</i>	12
<i>Quality of tendering documents</i>	12
<i>The stressed process</i>	13
<i>Communications</i>	14
NEXT STEPS	15
APPENDIX	16
<i>Priority Issues Identified by Sector</i>	16
<i>Evaluation</i>	20
<i>Attendees</i>	21

Welcome and Opening Remarks

OGCA President Clive Thurston welcomed participants. He commented that this procurement day was the result of a long period of preparation – a cooperative effort involving many different sectors. This meeting aims to improve lines of communication amongst general contractors, government, architects, designers, subcontractors, owners and buyers. It is an opportunity for all involved in construction procurement to understand each other's issues, work together and find solutions.

To maintain the momentum, OGCA has launched a micro website: www.procurementproject.ca. The purpose is to continue the dialogue, not just in Ontario but across Canada.

Mr. Thurston thanked the sponsors and the members of the Procurement Day organizing committee, who made this meeting possible. He thanked participants for attending and invited them to continue participating online through the website.

Executive Summary

The first Provincial Construction Procurement Day was held in King City Ontario on April 16, 2012. Contractors, buyers, designers, consultants, insurers, government and association representatives met to build understanding of the issues they face in the design and construction services procurement process, and to identify mutually satisfactory ways to address those issues.

Participants identified several priority issues.

Key Priority Issues

The following issues were identified as the top-priority issues that emerged from the small-group discussions of the issues encountered in the procurement process:

Top-priority issues to be addressed

- Risk management
 - Contract awards and tender awards
- Evaluation
 - The evaluation process and quality-based selection
- Procurement isolation and lack of knowledge
 - Procurement departments isolated from the end product, client, contractors, subcontractors, design professionals and facilities
- Use of non-standard contracts and supplementary conditions
- Non-use of standard contracts and use of excessive supplementary conditions
- Quality of tendering documents
- The stressed process
 - Lack of time; weak documents; unclear project scope
- Communications
 - Communication among various parties and potential for creating adversarial relationships

A number of potential solutions were proposed. Some of the key recommendations were as follows:

Risk Management

- Focus on risk management rather than risk transfer.
- Recognize that some risks cannot be transferred.
- Clearly identify the risks, roles and responsibilities. Educate to ensure understanding.
- Build strong teams. Focus more on collaboration and engagement, and less on avoiding litigation.
- Do proper planning, risk partnering and risk assignment.
- Set out rules of engagement so that everyone takes on appropriate risk.
- Allow adequate tendering time.
- Simplify requirements and evaluate bids based on quality and not just price.
- Recognize the important role of pre-qualified submissions.

Evaluation

- Shift the focus more toward quality rather than price.
- Be more transparent about the project budget.
- Create CCDC standard forms for prequalification (for consultants and contractors).
- Have a two-envelope selection process: a qualitative assessment; then a cost comparison.
- Use pre-qualification with CCDC 2. Factor in performance evaluation.
- Identify an industry-standard (or recommended) fee.
- Use QBS (quality-based selection). Find a forum to encourage the use of QBS.
- Consider the team composition and previous experience working together.

Procurement isolation and lack of knowledge

- Educate the procurement group on the client group's needs and the contractor's bidding process.
- Allow realistic timeframes for the tendering and procurement process.
- Have more consistency across different departments within the organization.
- Create industry working groups (bidding/closing, clauses, design).
- Implement weekly progress reports and involve designers at various stages of a project.

Use of non-standard contracts and supplementary conditions

- Increase communication amongst all parties: build understanding and find consensus.
- Have larger governing body assess non-standard contracts.
- Ensure that risks are clearly defined and assigned.
- Use clear language in non-standard contracts and supplementary conditions.
- Have owners stipulate that general contractors use some standard contracts with all subcontractors and suppliers.

- Work together as clients to develop common supplementary conditions for construction and design services.
- Review supplementary conditions with contractors.
- Recognize that some supplementary conditions and risk transfers are inevitable – ensure that they are sensible.

Quality of tendering documents

- Use QBS.
- Allow adequate time for proper design development.
- Ensure that the designer understands construction logistics.
- Incorporate a construction design review by an expert.
- Communicate clear expectations of the work required (owner to consultant).
- Create a database of issues so that the industry can find solutions.

The stressed process

- Identify inefficiencies in the tendering and bidding process.
- Create interactive teams, build understanding and raise the profile of procurement.
- Develop a long-term plan to improve communication and reduce silos.

Communications

- Have a project leader to oversee an integrated design and construction process and communicate feedback throughout the project.
- Use communications tools (one-on-one, online Q&A's, forms, clear response times).
- Start with a clear scope of work and clear documentation.
- Ensure an integrated design and construction process.
- Do a post-occupancy evaluation.

This event was the beginning of an ongoing dialogue and will be held regularly. The meeting identified a number of potential next steps. Continued participation is encouraged through a special website set up for procurement issues: www.procurementproject.ca.

Key Messages

- We got a chance to listen to the “other side” and learn about the restrictions they face. For example, it was interesting to learn what restrictions the procurement people face and some of the guidelines they have to follow.
- Everybody is taking responsibility for their part of the process.
- Too often we look within our own sector but we have to share information about what is happening throughout the entire industry.
- QBS is not new: it is a wheel that does not need to be reinvented. We just have to adapt it.
- The process is not broken. At times it is misunderstood; but it can be made better if we work collaboratively toward the main goal.
- There is value-added in this process.
- How do we implement the process and make any agreement reached binding on all parties?

Conclusions

- We need this type of cross-sectoral interaction to continue.
- We should focus on finding solutions through group discussion.
- Every area or sector should create its own list of issues. Then, as a group, we should prioritize those issues and focus on one or two at a time.
- Everyone agrees on the need to reconcile stakeholder interests.
- It is important to communicate key messages and conclusions to those who did not attend the April 16th Procurement Day. Oversight organizations can communicate messages.
- Risk management involves identification, quantification and allocation.
- We need ongoing information from the design side, as well as information on the top 10 procurement issues, education pieces and templates.
- More time and money should be allocated on the front end for planning and risk mitigation. The goals should be to achieve clarity, reduce the use of non-standard documents and reduce “risk downloading.”
- A key measure of success is to get agreement amongst all parties on the key issues.
- We can improve in three areas: fairness and transparency; more use of QBC; and the elimination of procurement silos.

SCOPING THE ISSUES

Participants divided into groups according to their role in the procurement process. Each group identified the main priority issues they encounter in the design and construction services procurement process (see appendix for a list of issues identified). The issues were then reviewed in plenary, where participants identified the key priority issues to be addressed in this meeting.

Key Priority Issues

The following issues were identified as the top-priority issues that emerged from the small-group discussions of the issues encountered in the procurement process:

Top-priority issues to be addressed

- Risk management
 - Contract awards and tender awards
- Evaluation
 - The evaluation process and quality-based selection
- Procurement isolation and lack of knowledge
 - Procurement departments isolated from the end product, client, contractors, subcontractors, design professionals and facilities
- Use of non-standard contracts and supplementary conditions
- Non-use of standard contracts and use of excessive supplementary conditions
- Quality of tendering documents
- The stressed process
 - Lack of time; weak documents; unclear project scope
- Communications
 - Communication among various parties and potential for creating adversarial relationships

Additional priority issues

- Lack of experience and knowledge of end-user staff (affects the ability to answer questions and evaluate bids)
- Incomplete bid submissions

Addressing the Issues

Participants broke into groups with representation from a cross-section of roles in the procurement process, to identify mutually satisfactory ways to address the priority issues. Their recommendations are summarized below.

Risk management

Group 1 (buyers and contractors)

- Take a more collaborative approach to issues, rather than a reactive/blame approach.
 - Risk partnering and risk assignment would lead to fairness and trust.
- Focus more on evaluating the team and less on the litigious approach of legal risk weighting.
- Create a set of risk documents.
 - Set out rules of engagement so that everyone takes on appropriate risk at the beginning of a project rather than downloading risk to others.
 - Consensus documents would help ensure that everyone participates. The aim should be to seek common ground and have a risk reduction strategy.
- Do not be victimized or blame the process.
- Take the long view, and do not just choose the lowest bid.

Group 2 (representation from a good cross section of sectors)

- Focus on risk management rather than risk transfer.
- Clearly identify the risk (do not be vague).
 - Recognize that some risks simply cannot be transferred.
 - Have clear roles and responsibilities with regard to specific risks.
- Use risk management tools.
 - Allow adequate tendering time.
 - Use insurance and bonding properly.
 - Use education to identify the types of risk and how to deal with them properly.
- Address risks during the bidding process.
 - Simplify requirements: the process should not be so complicated that nobody can comply. Reduce the number of pieces of information and the number of documents required, so that submissions are easier to evaluate and assess.
 - Recognize the important role of pre-qualified submissions.
 - Have contractor performance flow back into pre-qualification.

Group 3

- Use education – specifically for owners – to ensure understanding of everyone’s role in the process.

- Use engagement to involve people with the proper expertise as early as possible in the planning process.
- Use quality-based selection to drive value: If all bidders are close and pre-qualify, does taking the lowest bidder always ensure the best value and lowest risk?

Discussion

Participants made the following comments:

- By not taking the lowest bid, are we exposing ourselves to liability?
- The point is to redefine the process up front so that there is an option not to take the lowest bid.
- The best strategy may be to choose the bid closest to the mean.
- The solution is to add more qualitative components, and to start the process with the right design. But how can we define qualitative criteria that are easily evaluated?
- A municipal tender for sewer and water main work is generally well defined in terms of scope and materials. It would be hard not to pick the lowest bidder.
- We need to do more work to understand the products and materials available to address risk, rather than just the materials we will use to finish the project.
- We should list risks and identify those we can control and those we can't. For example, designers can ensure the completeness of documents, but not construction risks. Some risks are out of everyone's control (e.g. commodity prices).
- We must not just identify risks; we need all parties to fully understand the risks.
- We have to have a dialogue with contractors about what makes sense in terms of risk allocation. We need to look for consistency in terms of the clauses that can be included in contracts.

Evaluation

Group 1 (designers, architects and client representatives)

- Shift the focus more toward quality (which relates to risk). The lowest price does not necessarily offer the best quality.
- Buyers should be more transparent about the budget so that the industry can adjust and provide the best quality for that price.
- Create CCDC forms as industry standards (templates) for prequalification (one for consultants; one for contractors).
- Have a two-envelope selection process:
 - The first is based on experience, team, methodology, etc.
 - The second is based on cost.
 - Qualitative evaluations should be done by a group and should be transparent, collaborative and consensus-based.

- Pre-qualification for construction contractors:
 - Option one: identify qualified builders and choose from that group.
 - Option two: do an initial selection based on quality and experience selection, and then go to a second envelope based on price.
 - Performance evaluation could factor into this selection process.
- Consider identifying an industry-standard (or recommended) fee. Use lists of recommended fees and then ask “what can you do for us for that fee.” The goal is to create the best value for the client.

Group 2 (contractors, owners and consultants)

- QBS (qualification-based selection) has been proven successful, has been mandated in 50 states and is used by the city of London.
- Consultants:
 - Issue RFPs with the ultimate goal of QBS.
 - Include evaluation criteria with percentage ratings.
 - Include firm and team experience.
- Construction:
 - Use pre-qualification with CCDC 2, to create a shortlist. Choose only from contractors that are experienced and have the capacity to do the job.
 - From the pre-qualified pool, price is one factor but its impact on the contract award should be lessened.
- Collaboration is an important factor. The QBS system gives weight to the composition of the team. Has the team worked well together in the past? A team with a successful track record offers more likelihood of success and lower risk than a new team or a previously unsuccessful team.
- What is the best forum to move these goals forward? How do we convince all the municipalities that QBS is a good system?

Discussion

- QBS is not related to “best and final offer.”
- Contractors should be given an opportunity to address issues and problems every two to three weeks during a contract, so that they are not surprised by a low evaluation at the end of the job – particularly if performance is linked to pre-qualification for the next job.
- Other regions (e.g. Europe) have a selection process that allows them not to go with the lowest bid. Getting to that point requires a series of smaller steps and a major change in mind-set, particularly when public money is involved.

Procurement isolation and lack of knowledge

Group 1 (a good cross section of participants, including a city councilor)

- Cross-pollinate the procurement group with the client group: educate, train and inform the procurement group so that they have a better understanding of what the client group wants to procure. (One region places procurement people directly in the departments that do a lot of buying.)
- Allow realistic timeframes for the tendering and procurement process.
- Have more consistency across different departments within the organization.
- Educate the various stakeholders: invite procurement people to witness a tender closing to create understanding of what the contractors go through to meet deadlines for procurement bids (perhaps create a video).
- Create industry working groups (bidding/closing, clauses, design).

Discussion

- Consider implementing weekly progress reports. In the US, one contractor deals with a third-party inspector who looks at design, safety, quality and environmental aspects. At weekly progress meetings, the contractor gets a report card for the previous week.
- Involve designers more at different stages of the project. At the start of the project, have the designer walk through the site and identify potential problem areas. Once the project starts, do another walk-through and ask if the design is being realized. At the end of the project, do another site visit to identify lessons learned.

Use of non-standard contracts and supplementary conditions

Group 1 (general contractors, sub-trades and school board representative)

- Dialogue amongst stakeholders:
 - Communicate with the owner, designer and contractor, to create understanding of what using a non-standard contract really means to the success of the project.
 - What if there was a larger governing body that could assess a non-standard contract and indicate whether it was a fair contract?
- Risk:
 - Risks need to be clearly defined and assigned.
 - Owners may use a non-standard contract to download risk. There may be a committee requirement to assess risk before a bid goes out.
- Clarity of language:
 - The language of non-standard contracts and their associated supplementary conditions should be clear. Clear language helps contractors understand the owner's requirements.

Non-use of standard contracts and use of excessive supplementary conditions

Group 1 (school board, municipalities and a contractor)

- Find consensus among all parties. Because contracts exist between two parties, it is essential to get all the groups together to discuss the issues.
- Investigate the feasibility of owners stipulating that general contractors use some standard contracts with all subcontractors and suppliers.
- Owners could review their supplementary conditions with contractor groups that do not necessarily talk to each other regularly.
- Client groups could work together to develop supplementary conditions for both construction and design services.

Discussion

- We cannot get rid of supplementary conditions or risk transfer, so we should try to ensure that they are sensible.
 - Some owners are going to draft their own contracts because they have their own needs. These needs are driven partly by politics (e.g. city councillors, who have their own responsibilities and answer to taxpayers).
 - School boards and others who adopt CCDC contracts will have supplementary conditions to address their specific needs.
 - Some risk transfers are inevitable. If you are not the best one to bear the risk, you may just have to price it in.
- There is no common understanding of non-standard conditions and it may be difficult to assess their meaning in different contexts. The risks are often not well defined in terms of how they are priced. Disclosing assumptions and interpretations regarding non-standard risk items would support discussion of how to manage risk effectively.
- When owners elect to transfer non-standard risks, they will sometimes get bidders who do not fully understand or appreciate the risk, with vast differences in the quality of the bids. Some will understand and put in appropriate contingency for the risk; others will not – creating an unbalanced bid process.
- There may be different understandings of the risk and divergent expectations. If the slightest thing goes wrong, lawyers get involved.

Quality of tendering documents

Group 1 (diverse representation)

- QBS (quality-based selection) would help in addressing this issue and should be discussed further.

- We need more strategic time management.
 - There is a lack of time for the design development stage.
 - The designer, contractor and owner should have input at that stage.
 - Organizational culture should be changed so that the finance people allow for a realistic timeframe for proper design development so that changes are not needed further along in the project.
- The designer should understand construction logistics.
- Implement a construction design review (by retired experts?) to ensure that the construction phase is practical.
- Communicate clear expectations of the work required (owner to consultant).
- Create a database of issues so that the industry can focus on the priority issues and find solutions.

Discussion

- For general contractors, the number of staff involved in projects has increased over the past 25 years. In general, project planning is less detailed than it used to be. This means that projects are designed on-site more often – a trend that is driving costs up.
- Should semi-retired experts be hired to review documents before they go out for tender?
 - Yes: This would be a great investment to help flag issues before the documents go out.
 - No: Consultants should be able to do this review themselves – the issue is experience.
 - From the designer point of view, there is not always a right or wrong way, but a set of goals they try to synthesize together. Outside experts who do not have long-term responsibility for the project are not the ideal reviewers. A better approach would be a qualitative review that is informed by the design process.
- The consultant's fee is not the only cost to be considered; the life-cycle cost of the building is a huge factor to keep in mind and is affected by the quality of the consultant.

The stressed process

Group 1 (government ministry, procurement, architect and contractors)

- Look at the true cost of tendering and bidding, and identify inefficiencies. What is the reality for contractors?
- Create interactive teams, with all parties understanding the process (general contractors, consultants, procurement, etc.). Raise the profile of procurement.
- Do long-term planning to improve communication. Right now, everyone is working in silos – identify where there is overlap and get buy-in from senior management for improved communication.

Communications

Group 1 (a good mix of representation)

- Have a project leader with experience in the design and construction field.
 - This person should oversee an integrated design and construction process.
 - The project leader should be a focal point for a feedback loop from beginning to end (occupancy).
 - The project leader should bring in the right people at the right stages.
- Have a communication/process tree.
 - Identify communications tools (one on one, online Q&A's, forms, clear response times).
 - Start with a clear scope of work and clear documentation.
 - Ensure an integrated design and construction process: involve people with experience in each area from day one. All parties should have a point person.
- Do a post-occupancy evaluation.
 - Was the project scope and design achieved?
 - Was the “through-process” successful?

NEXT STEPS

Clive Thurston noted that the Procurement Day organizing committee had several ideas in mind for follow-up to this meeting:

- Have an ongoing dialogue and hold this meeting again either every two years or annually.
- Identify four or five goals that could be tracked in the industry to see if this dialogue is making a difference.
- Consider setting up smaller committees to look at specific issues.

There are several options for continuing the dialogue:

- The committee has set up a website on this issue: www.procurementproject.ca.
- Participants should circulate the meeting report and executive summary widely.
- Comments can be made through Twitter.

Participants suggested the following next steps:

- Hold an annual event on the first Monday of every April.
- Arrange speakers to describe and discuss bidding and tendering processes.
- Create mixed subcommittees (with representation from owners, contractors and designers) to address priority issues one at a time.
 - The subcommittees could be tied into the annual event.
 - OGCA should set up these groups.
- Hold follow-up meetings among organizations that participated in today's meeting.
- Provide feedback to organizations that have created standard RFPs, fee schedules, practice advisories, standard contracts, standard supplementary conditions and other documentation.
- Collect statistical information on questions like how many contracts use CCDC 2.
- Conduct a benchmarking study on topics such as use of QBS.
 - Involve municipalities, school boards and government departments.
 - CDAO is a 700-member, multi-sector group that could help to facilitate this survey.
- Establish a process to review and amend wording of key contract clauses that lack clarity and cause difficulty.
- Create a forum to promote the use of QBS amongst municipalities and public buyers.
 - OAA is a good forum.
 - What about a forum of owners/buyers?
 - ACEC was working with the Canadian Standards Association, which had a module for public buyers for QBS.
- Find or develop an educational program on the use of QBS.
 - OAA and ACEC are two groups that could help with this.

APPENDIX A

Priority Issues Identified by Sector

Owners and Buyers

- Risk management and liability
- Cost containment (change orders)
- Communication amongst all parties
- Release of funds – incremental; what to do with the funds; who gets funds at what time
- Interpretation of the BPS (Broader Public Sector) document, both internally (procurement/construction field) and externally (contractors)
- The learning curve between facilities and procurement (with regard to the BPS document)
- Document clarity (Who has final responsibility for the production of the document?)
- Inadequate time
 - Addendums; last-minute questions from bidders; bidding; closing
 - Time out in market
 - Internal planning: project managers sometimes wait too late to get supply services or legal departments to look at a project
- Incomplete bids submitted
 - Missing signatures, bid bonds, prices
 - Mandatory requirements not met
- Unrealistic or unnecessary mandatory requirements
 - Site meetings; specifications; insurance requirements

Public Sector

- Adversarial relationships between consultants and contractors
- Communication among all involved (timely and clear)
- Selection of consultants and contractors based on quality (not just price)

Contractors (both ICI and road-building)

- Amount of information required by bid forms at time of submission
- Use of non-standard contract documents or expensive list of supplementary conditions
- Lack of feedback/transparency on bid results and evaluation processes

General Contractors

- Lack of client expertise, experience and planning for the tendering process
- Lack of fair transparent, consistent pre-qualification process and evaluation

- The process is becoming complex and inconsistent and should be standardized
- Lack of transparency regarding bid results
 - Clients should announce results and debrief to help bidders learn what they could do to improve their submissions

Subcontractors

- Quality and clarity of design documents
 - Poor-quality specifications and drawings; documents completed in haste
 - Design risk is then passed down to contractors (contractors are expected to make the corrections or notice the issues)
 - Contractors bid accordingly, expecting additional work
 - This issue creates lack of trust, payment issues
- Complexity of terms and conditions
 - Terms and conditions are often added to CCDC contracts
 - The tender period makes it impossible to review lengthy documents
- Selection criteria for the naming of subcontractors
 - General contractors may be used to dealing with specific subcontractors
 - General contractors may shop price after the contract closes
- Downloading risk
 - This is a pattern that needs to be explored in detail
- Better design is needed
 - Cost saving in the design process results in higher costs in the construction phase.
 - Better design reduces the need for supplemental conditions (downloading risk; additional bonding and insurance)
 - Better project design identifies responsibility for coordination and reduces late and large addendums
 - Need cut-off date for addendums
- Bid shopping and the naming of subcontractors
 - Post-tendering negotiations would be reduced by having the prime contractor name the subcontractors
 - Updated standard documentation (standard guidelines under CCDC 23e)
- Non-standard contracts
 - Payment issues (holdbacks, “paid if paid” clauses), liquidated damages
- Awarding of contracts in water and sewer sectors might require different solutions

Design Sector

- Lack of fairness
 - No one’s work process is respected – public directive for procurement looks good but in many systems, information is not flowing
- Lack of quality in the end product

- No understanding of design due to specialization of the “procurement” department (contractors do not understand design)
- The goal should be to direct as many resources as possible into the end product
- Lack of efficiency
 - Too much money is spent by all parties (contractors, designers, purchasers) on procurement rather than on the end product
- Unrealistic allocation of risk to the design profession
 - This occurs in all the different procurement processes
- Unsustainable time and cost investment in procurement
 - BPS, IO AFP (Infrastructure Ontario Alternative Finance and Procurement) process
 - Private sector influenced by public process (the large amount of public sector procurement affects what the private sector does, putting an increasing burden on procurement even outside the public sector)
- Lack of client-side expertise to evaluate/prepare
 - Poor definition of the scope of work
 - Contractors bear the burden of managing the increasingly complex procurement process
 - Selection is often made based on price because of information overload and difficulty in making the evaluation

Lawyers, Public Sector Procurement, Subcontractors

- Quality and clarity of the design documents
 - Specifications and drawings
 - Over the years, the level of detail has degraded, making it harder to put together a strong bid
- Complex and unreasonable terms and conditions
 - Too many supplementary conditions
 - Downloading of risk: legal departments are advising owner not to assume risk – it gets passed down to the general contractor and then to the subcontractor
- Bid shopping
 - Contractors should name their subcontractors at the time of tender and this should become part of the contract

Professional Liability Insurers and Insurance Underwriters

- Differing expectations regarding the downloading and allocation of risk
 - Surety and insurance products – understanding options
- Lack of standardization of documents
 - There are pros and cons to a lack of standardization, but some consistency is preferable
- Value versus price

- The life-cycle cost of the facility should be considered

Associations, Architects, Consulting Engineers, Design, Construction

- Lack of consistency and uniformity among owners and buyers
 - Procurement process
 - Bid documents and specifications
- Evaluation criteria and weighting
 - Understanding the criteria
 - Having criteria that lead toward best value rather than low bid
- Risk transfer
 - Some contract language is unrealistic
 - What is reasonable?

Mixed Sectors

- Risk allocation and management
 - Inappropriate downloading of risk (to parties not equipped to handle it)
 - Inappropriate risk-management approaches
- Incomplete and non-standard documents and plans
 - Lack of time to complete bids leads to confusion and higher costs
 - The plethora of non-standard documents and supplementary conditions is a serious concern
- Inexperienced and unknowledgeable staff (procurement people without experience with the construction sector)
- Work scope definition
 - Making sure everything is clearly defined and keeping change to a minimum
- Contractor health and safety records
 - Making sure contractors/subcontractors are working safely on site
- Good project management and good communications between contractor and owner

APPENDIX B

Evaluation

From the time that we first heard about this Procurement Day until right now, what has gone well?

- Having all the stakeholders in the room at once was good.
- The level and caliber of the people in the room makes a difference because we have people who understand and want to work together.
- We have been in a remote location, which keeps people in the room.
- We have people in the room who want to understand each other and improve the industry.
- The meeting was interactive rather than following a presentation format.
- The organizers did a good job of putting the meeting together.
- The planning team and sponsors collaborated well.

What might we do differently the next time such an event is held?

- Have a participant list in advance.
- Include case studies.
- Have guest speakers and panels to discuss issues such as tendering processes.
- Include other groups who are not currently in attendance – particularly those who want to be understood – and help them to understand others.
- Include a report back on follow-up from this meeting.
- Start where we left off in 2012.
- Have the opportunity to jump from group to group during the day.
- Work on a specific contract.
- Have representation from elected officials, trustees, etc.

APPENDIX C

Attendees

LAST	FIRST	EMAIL	COMPANY
Accardi	Joseph	joe.accardi@oswca.org	Ontario Sewer & Watermain Const. Ass'n
Ackerley	Glenn	gackerley@weirfoulds.com	WeirFoulds LLP
Allan	David	DAllan@barrie.ca	City of Barrie
Allen	Colleen	colleen.allen@yrdsb.edu.on.ca	York Region District School Board
Bakmand	Ove	ove@net-electric.com	Net Electric Limited
Bassett	Ray	rbasset2@travelers.com	Travelers Canada
Bell	Tracie	Tracie.bell@infrastructureontario.ca	Infrastructure Ontario
Beltrano	Franca	c/o Mike.Piemontese@ttc.ca	Toronto Transit Commission
Bitsakakis	George	george.bitsakakis@stantec.com	Stantec
Blake	David	dblake@mckaycocker.com	McKay Cocker Construction Ltd.
Bradford	Rob	rob@orba.org	Ontario Road Builders Association
Braithwaite	Ed	ebraithwaite@ccconst-eng.com	C & C Enterprises Electrical Const. Limited
Brnjas	Joann	jbrnjas@suretycanada.com	Surety Association of Canada
Buitenhuis	Lisa	LBuitenhuis@regionofwaterloo.ca	Ontario Public Buyers Association
Burjaw	Michael	michael.burjaw@sheridanc.on.ca	Sheridan Institute of Technology
Butcher	John	jbutcher@magma.ca	Associates in Planning
Camilleri	Dan	dan.camilleri@guldelectric.com	Guild Electric Ltd.
Chlebowski	Jerry	jchlebowski@cannondesign.com	Ontario Association of Architects
Churchill	Jennifer	jennifer.churchill@ontario.ca	Ministry of Finance
Clarke	Glenn	gclarke@smcdsb.on.ca	Simcoe Muskoka Catholic District School Board
Crepinsek	Tony	tony.crepinsek@gtaa.com	Greater Toronto Airports Authority
Crombie	Bonnie	c/o Robert.Trewartha@mississauga.ca	City Councillor Ward 5
Dawson	John	john.dawson@genpro.ca	Gen-Pro
DiGiovanni	Mary	Mary.DiGiovanni@vaughan.ca	City of Vaughan
Doyle	Kristi	KristiD@oaa.on.ca	Ontario Association of Architects
Dunn	Bob	dunnr@ppims.mcmaster.ca	McMaster University
Dyck	Steve	Steve.Dyck@infrastructureontario.ca	Infrastructure Ontario
Endicott	Marie	marie.endicott@york.ca	York Region
Fernando	K.J.	sherri.barnhardt@dpcdsb.org	Dufferin-Peel Catholic District School Board
Frame	David	david@ogca.ca	Ontario General Contractors Association
Friesen	Debbie	dfriesen@environmentmatters.ca	Environment Matters
Gal	Stan	stan.gal@york.ca	York Region / Ont. Municipal Buyers Ass'n
Gardiner	Tina	tina.gardiner@york.ca	York Region
Gatien	Dean	dgatien@powertel.ca	PowerTel Utilities Contractors Limited

LAST	FIRST	EMAIL	COMPANY
George	Martha	mgeorge@gvca.ca	Grand Valley Construction Association
Gerrior	Mike	mike.gerrior@york.ca	York Region
Gillan	Bill	bgillan@revay.com	Revay & Associates Ltd.
Gourlay	Simone	SimoneG@haltonhills.ca	Town of Halton Hills
Grisolia	Ed	ed.grisolia@giffels.com	Giffels
Grossmann	Janine	janineg@hidi.com	Hidi Rae Consulting Engineers
Hackett	John	johnh@indplan.com	Pro-Demnity
Hadjiyianni	Jim	jim.hadjiyianni@ontario.ca	Ministry of Finance
Harvey	Cliff	clifford.harvey@ontario.ca	Ministry of Health & Long Term Care
Hastings	Paul	paul.hastings@pwgsc.gc.ca	Public Works & Government Services Canada
Hollingworth	Paul	PHollingworth@gcna.com	The Guarantee Company of North America
Hope	Susan	susan.hope@york.ca	York Region
Horobin	Victoria	victoria@kbhinteriordesign.com	KBH Interior Design Inc.
Inch	Michael	michael.inch@infrastructureontario.ca	Infrastructure Ontario - Corporate Legal Svcs
Jennings	Kelly	homeniuk_dennis@durham.edu.on.ca	Durham District School Board
Jitomirski	Leo	leo.Jitomirski@ontario.ca	Ministry of Finance
Katz	Anne	anne.katz@zurich.com	Zurich Surety
Kelson	Michelle	mkelson@kelson.on.ca	Kelson Mechanical
Kiraly	Alex	alexk@ross-clair.com	Ross-Clair Contractors
Lewis	Eric	ericlewis@zing-net.ca	Heavy Construction Association of Toronto
Lynch	Mary Ellen	mel@lynchcomisso.com	Lynch & Comisso Architects
MacIntyre	James	macintyrej@region.peel.on.ca	Region of Peel
Maggio	Alfred	amaggio@grahambros.com	Graham Bros Construction
Martini-Wong	Saskia	smartini@ceo.on.ca	Consulting Engineers of Ontario
Martins	Pedro	sean.wiley@snclavalinom.com	SNC-Lavalin Operations & Maintenance Inc.
McConnell	Patrick	mcconnellpmj@gmail.com	Communications Consultant
McGillis	Ron	rmcgillis@rogers.com	Ontario Construction Users Council
McQuat	Doug	njames@carillion.ca	Carillion Construction Inc.
McQuillan	Chris	cmcquillan@cannondesign.com	Cannon
Miller	John	john.miller@waterloo.ca	City of Waterloo
Mindenhall	Andrea	Andrea.Mindenhall@halton.ca	Regional Municipality of Halton
Murray	Sean	bpatterson@comstockcanada.com	Comstock Canada Ltd.
Needra	Peter	peter.needra@xlgroup.com	XL Insurance
Ness	Steven	sness@suretycanada.com	Surety Association of Canada
O'Callaghan	Tom	tomo@fowler.ca	Fowler Construction Company
O'Donnell	Robert	bob@greatertorontoeca.org	Greater Toronto ECA
Ohashi	David	David.Ohashi@halton.ca	Region of Halton
Paglia	Jerry	jerry.paglia@york.ca	York Region

LAST	FIRST	EMAIL	COMPANY
Pagnanelli	Anthony	tpagnan@toronto.ca	City of Toronto
Panciuik	Stephen	stephen.d.panciuik@encon.ca	Encon Group Inc.
Paniccia	Guido	guido@eliteconstructioninc.com	Elite Construction Inc.
Pask	Gary	KristiD@oaa.on.ca	Ontario Association of Architects
Payne	Catherine	Catherine.Payne@simcoe.ca	County of Simcoe
Pickering	Craig	cpickering@modernniagara.com	Modern Niagara Ltd.
Piemontese	Mike	Mike.Piemontese@ttc.ca	Toronto Transit Commission
Pigott	Bill	wpigott@millerthomson.ca	Miller Thomson LLP
Poland	Randy	marwan.saliba@snclavalinom.com	SNC-Lavalin Operations & Maintenance Inc.
Poloni	Ivan	ipoloni@ellisdon.com	EllisDon Corporation
Portelli	Sharon	sportelli@arido.ca	Association of Registered Interior Designers
Puttock	Roger	roger.puttock@cbre.com	CBRE Richard Ellis
Reinders	Mike	mreinders@maple.ca	Chairman, OGCA
Roberts	Eryl	eroberts@ecao.org	ECA Ontario
Salmon	John	jsalmon@armilne.com	A. R. Milne Electrical Ltd.
Sharp	Sheena	sharp@coolearth.ca	Ontario Association of Architects
Strickland	Sean	seans@iciconstruction.com	Ontario Construction Secretariat
Thurston	Clive	clive@ogca.ca	Ontario General Contractors Association
Travassos	Helder	helder.travassos@shibleyrighton.com	Shibley Righton
Valens	Scott	scott.valens@humber.ca	Humber College
Vanos	John	jvanos@pr.uoguelph.ca	University of Guelph
Vivian	Tom	consultv@bell.net	Consult Construction Consulting Services Ltd.
Watkinson	Brian	brian@strategies4impact.com	Strategies 4 Impact
Watson	Brian	brianw@robertsonbright.com	Robertson Bright Inc.
Wells	Dave	dave.wells@tdsb.on.ca	Toronto District School Board
White	Erinne	erinne@ewhite.ca	Associates in Planning
Wiggins	Susan	swiggins@idcanada.ca	Interior Designers Canada
Wild	Wolfgang	wolfgang.wild@gtaa.com	Greater Toronto Airports Authority