

## Event Meeting Minutes - Cogence Alliance-Central Ohio Chapter

**DATE:** February 27, 2019

**TIME:** 4:30 pm – 6:30 pm

**LOCATION:** The Idea Foundry, 421 W. State St, Columbus, Ohio

**EVENT TITLE:** Risky Business – Central Ohio Chapter Kick-Off

**ROOM SET-UP:** Rounds with seating; stakeholders were placed in silos

**PURPOSE:** Our first topic addresses risk. Risk is a fact in our industry, and one that all of us share. And if we are going to work together toward an improved construction industry, with better project outcomes for all involved, we must begin by identifying risk from the unique perspective of the Owner, Architect, Engineer, CM, Trade Contractors, and Affiliated professionals.

**MINUTES:** Sherm Moreland introduced Cogence to the group and explained the premise of the Alliance. Cogence is an unbiased group, that does not permit business development at their events. We come together to improve and change our industry with an equal voice amongst all stakeholders, and we strive to work collaboratively with other organizations.

Paula Selvaggio, Oswald presented the risks that are seen throughout the construction industry and the some of the costs associated with those risks.

Jeff Ortman explained how the next three meetings will work and how the information will be gathered, disseminated, and turned into a resource for the Central Ohio Region.

Everyone was placed into their silo (A, Af, E, CM, O, T), each table had a note taker and the whole silo worked together to identify the risk they experience through the timeline of the project. This was done in accordance to a CM at Risk contract/project.

### Top risk items – report out

**Architects** Yellow post-it (Sam Rosenthal, Schooley Cladwell): Inexperienced client team that does not understand the roles and the process; Contract; Financial stability throughout the project life.

**CM's** Blue post-it (Brian Mooney, Turner): Setting realistic budgets; skilled workers

**Owners** Orange post-it (Mark Davis, Ohio Health): Market conditions; Budget expectation; Alignment with changing needs (medical-changing technologies, needs, etc.)

**Trade Contractors** Light Bluegreen post-it (Jay Sharp, Limbach): Manpower, skilled labor/management at the right time; Completeness of the drawings/expectations of the project/ details on the drawings; Schedule, keeping the schedule updated

**Affiliate** Bright Green posit-it (Fred Bills, Weston Hurd): Negotiating contract upfront how to allocate risk, what is covered, timing of services, costs and GMP; Realistic budget; Managing communications

**Engineers** Green post-it (Joe Ferdelman, Heapy Engineering): Honest communications; Redesign; Roles and responsibilities

**Additional risks:** Insurance risk; not enough time spent on pre-planning so everyone can do their job properly; contract negotiations, value of service; communication (talk to one another); training and education; communication; mentor young staff; not understanding what and how each group works; same risks/different priorities-perception

**NEXT STEPS:**

- Becoming a Partner;
  - Annual Dues = \$500
  - Fill out the Commitment Letter ([www.cogence.org](http://www.cogence.org))
  - Send form to Bonnie at [Admin@Cogence.org](mailto:Admin@Cogence.org) (or give to a member of the formation committee)
  - You will receive an email with the ability to pay annual dues on-line and additional information needed
- This is your Chapter lets tailor it to our region and our risk;
- Contact a formation committee member to serve on a committee
  - Program
  - Partnership
  - Resource / Advocacy

**PLUS/DELTA:**

Plus: Leadership Attendance Engagement Adequate time in meeting setup/invite Authentic interest to make industry better	Delta: Sound / microphone problem More time Columns obstructed site lines Owners rep own table
--	--

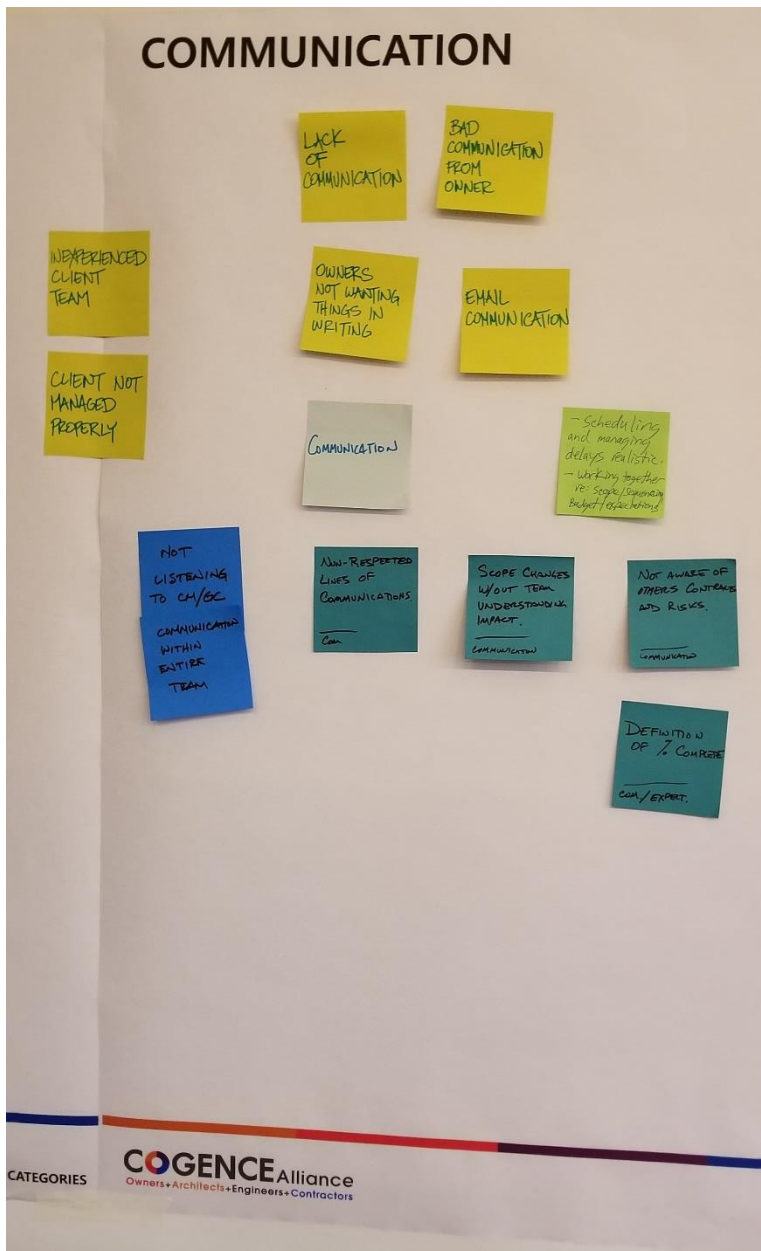
**NEXT MEETING:** April/May TBD, 2019, 4:30 pm Risk Assessment  
 Location: TBD

### Photos of the Risk Buckets

Post-it colors:

- **Affiliate** Bright Green
- **Architects** Yellow
- **CM's** Blue
- **Engineers** Green
- **Owners** Orange
- **Trade Contractors** Light Bluegreen





# CONTRACT ISSUES

# FINA

**UNINSURABLE CONTRACT RISK**

**CONTRACT REFERENCES THINGS IN CONFLICT WITH EACH OTHER**

**SCOPE NOT CLEARLY DEFINED**

**CONTRACT SHIFTS RISK TO A/E**

**CONTRACT NOT REVIEWED UP FRONT**

**BUDGET ISSUES**

**UNDEFINED ROLES AND RESPONSIBILITIES**

**CONTRACT/FLOW OF**

**INDEMNIFICATION ISSUES**

**STANDARD OF CARE TOO HIGH**

**PAYMENT TERMS CHANGE MID-STREAM**

**Expertise to Negotiate Partnership**

**CONTRACT UNDERSTANDING DAMAGES**

- Builder's Risk coverage
- Defective workmanship coverage
- Construction delay coverage

- VE to see costs
- During Constr.
- Plan Review Prior to work

**OWNER WANTS REDUCED CA**

**Design Team CA Services**

- Owner failing to see value at upfront cost
- Waiting for scope clarification to Risk

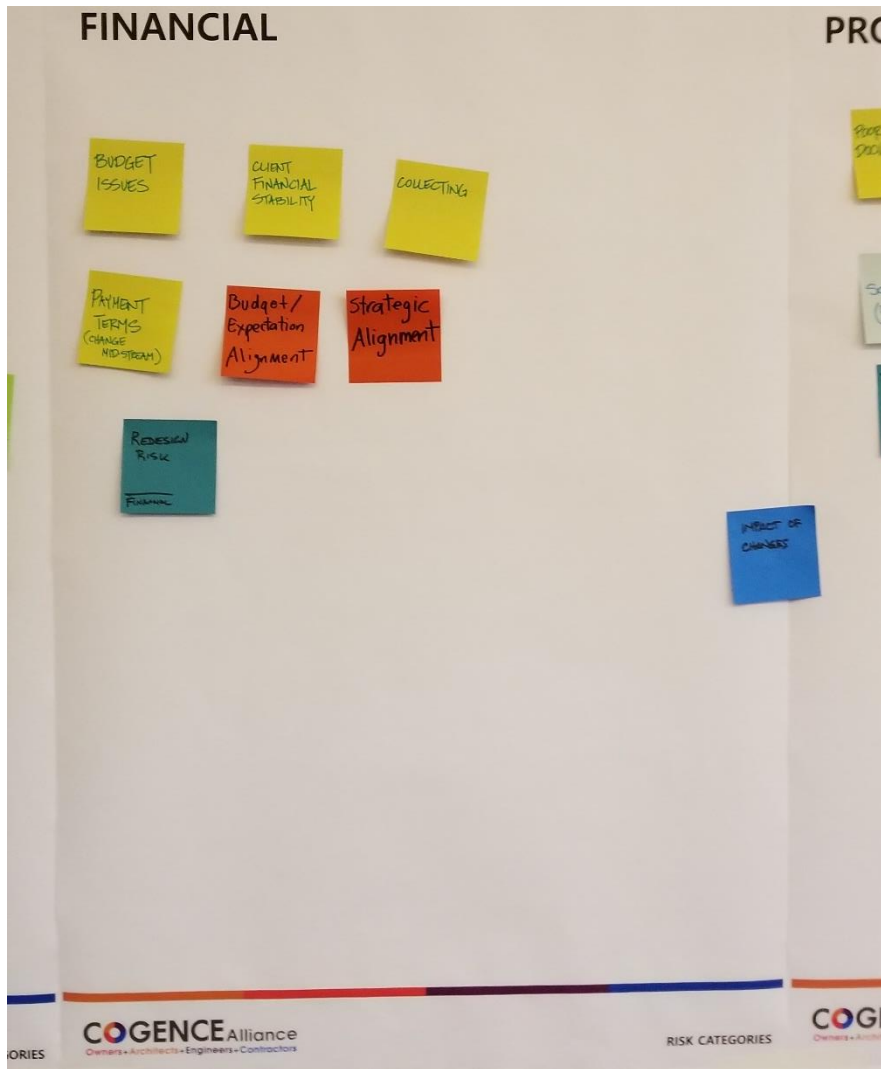
**Red Risk**

**Final**

**COGENCE Alliance**  
Owners • Architects • Engineers • Contractors

**RISK CATEGORIES**

**COGENCE**  
Owners • Architects



# PROJECT MANAGEMENT

The whiteboard contains the following sticky notes:

- POOR DOCUMENTATION
- CRP THE - Force on work - cost and time - quality issues - "budget" edge
- SAFETY
- INCOMPLETE DESIGN
- SCHEDULE (DECREASE TIME)
- NEW OR OWNERS CONSULTANTS
- UNREALISTIC SCHEDULES
- VALIDATION OF SOME SCHEDULE AND BUDGET
- TRAINING OF YOUNGER STAFF
- PERSON SCHEDULE
- LACK OF LEADERSHIP IN HOUSE
- LACK OF EXPERIENCE OF CONSTR TEAM

COGENCE Alliance  
Owners + Architects + Engineers + Contractors

RISK CATEGORIES

COG  
Owners + Architects

# QUALITY

MAN POWER  
(LACK OF SKILLED)

Quality  
s/c  
Market

LEVEL OF  
DETAIL IN  
CM'S ESTIMATE

SKILLED  
WORKERS  
AVAILABILITY

OWNER NOT  
ALLOWING  
ADEQUATE CA.

PRECEDENT  
SCHEDULE

INEXPERIENCED  
A/E TEAM

LACK OF  
EXPERIENCE  
OF CONSTR.  
TEAM

**COGENCE** Alliance  
Owners + Architects + Engineers + Contractors

RISK CATEGORIES



