





## Plenary 1

# It's All in a Name: PM, CM – What Do You Do?

### Presenters:

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## Background

- Who really manages a complex construction project?
- How should an owner decide how to allocate management?
- Is there a tension between desire to manage/control and responsibility/liability that goes with it?



Who really manages a complex construction project?

Owner  
Program Manager  
Project Manager  
Construction Manager  
Construction Manager Advisor  
Owner's Representative  
General Contractor

## Who really manages a complex construction project?

- Team versus individual management



## Who really manages a complex construction project?

- High level coordinator
  - In-house
  - PM



## How should an owner decide how to allocate management?

- Compartmentalize management tasks





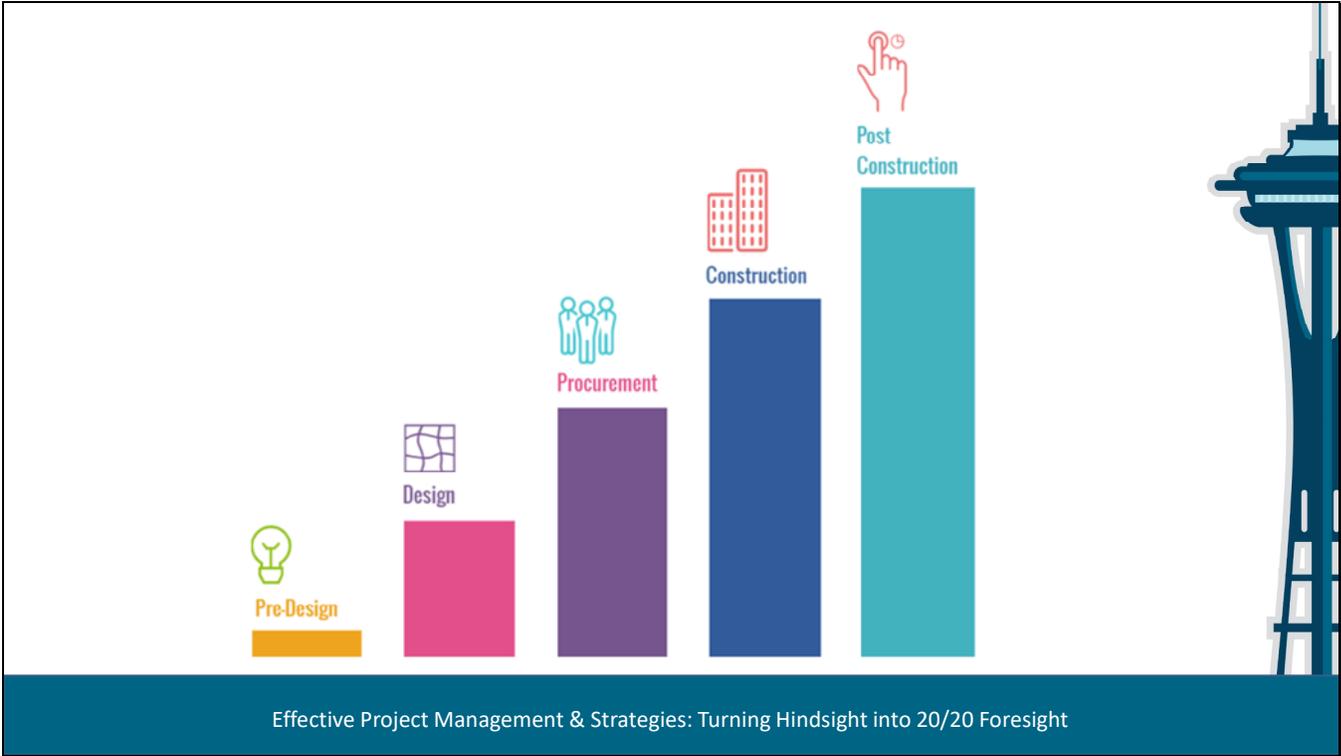
## How should an owner decide how to allocate management?

- Allocation of risk management
  - Higher allocation to party who can best control the risk

## Is there a tension between desire to manage/control and responsibility/liability that goes with it?

- Alignment of Owner and PM
- Owner's reserved management powers
- Contractor's control







## PRE-DESIGN Management Functions

- Setting overall scope of work
- Considering overall schedule
- Obtaining financing



## DESIGN PHASE Management Functions

- Determining standards of design (useful life, LEED, etc.)
- Selecting owner design consultants
- Site investigation



## PROCUREMENT PHASE Management Functions

- Selecting project delivery system
- Prequalifying bidders



## PROCUREMENT PHASE Management Functions

- Drafting a Request for Proposals (or Bid Invitation) package
- Review and evaluation of proposals
- Bid questions and protests



## CONSTRUCTION PHASE Management Functions

- Construction managers (at risk v. not at risk)
- Owner-furnished materials & equipment
- Creating & reviewing construction schedules
- Reviewing & approving technical submissions



## CONSTRUCTION PHASE Management Functions

- Reviewing & approving pay applications
- Safety
- Inspection & quality assurance
- Change orders & claims



## POST-CONSTRUCTION PHASE Management Functions

- Certificates of occupancy
- Owner move-in and training
- Punchlists
- Warranty issues



## STANDARD CONSTRUCTION FORMS

- American Institute of Architects (AIA)
- ConsensusDocs
- Canadian Construction Documents Committee (CCDC)



## American Institute of Architects

- AIA “Program Management Family”
  - Forms Bank
- AIA Document C172-2014
  - Owner/Program Manager



## American Institute of Architects

- AIA Document C132-2019
  - Owner/CMA
- AIA Document A133-2019
  - Owner/CMc-Cost plus Fee w/ GMP
- AIA Document A134-2019
  - Owner/CMc-Cost Plus Fee no GMP



## ConsensusDocs

- ConsensusDocs 830 Standard Owner and CM as Agent
  - CM provides General Conditions



## ConsensusDocs

- ConsensusDocs 831 Standard Owner and CM
  - CM does not provide General Conditions



## ConsensusDocs - Addendums

- ConsensusDocs 541 Addendum to Agreements Between Owner and CM and Between Owner and Design Professional for Design-Assist Services



## ConsensusDocs - Addendums

- ConsensusDocs 305 Lean Construction Addendum



## Canadian Construction Documents Committee

- CCDC 5B - 2010 Construction Management Contract for Services and Construction



## Canadian Construction Documents Committee

- CCDC2 - 2008 Stipulated Price Contract



## Canadian Construction Documents Committee

- CCDC 5A - 2010 Construction Management Contract for Services



## Questions?

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