



**May**  
**9-11**  
**2016**



*Acquiring Projects Requires  
More Than A Good Estimate*

# ESTIMATING

**PROJECT PROCUREMENT  
AND STRATEGIES**  
**4<sup>th</sup> EDITION**  
**SASKATOON, SK**



# CONFERENCE SPEAKERS:

## Who Should Attend?

Company Presidents and Owners, Vice President of Estimating, Chief Estimator, Estimator, Project Managers who also estimate, or anyone responsible for estimating and procurement of work.

## When:

May 9-11, 2016

## Conference Location:

Hampton Inn & Suites by Hilton  
Saskatoon Airport  
110 Gateway Blvd, Saskatoon, SK S7L 1S4 Tel: 306-933-1010

## Hotel Location:

Ideally situated less than one mile from the Saskatoon John G. Diefenbaker International Airport, Hampton Inn & Suites by Hilton Saskatoon Airport offers a prime location for business travelers and visitors to Saskatoon. Enjoy easy access to attractions such as the SaskTel Center and the South Saskatchewan River. Downtown Saskatoon is also just ten minutes away.

Feel at home in a spacious guest room or suite at this contemporary hotel in Saskatoon. Each room features stylish décor and modern amenities, including free WiFi access, an HDTV and a clean and fresh Hampton bed™. Start the day right with Hampton's free hot breakfast. If you're heading out to explore the area, pick up a free Hampton On the Run™ Breakfast Bag on your way out the door, available Monday to Friday.

Business is easy at this Saskatoon Airport hotel with complimentary WiFi access. Enjoy a workout in the modern fitness center or take a dip in the indoor pool and hot tub. We also offer a 24-hour convenience store with a great selection of drinks and snacks to enjoy in your guest room or on the go.

### Hampton Inn & Suites by Hilton

Saskatoon Airport  
110 Gateway Blvd, Saskatoon, SK S7L 1S4 Tel: 306-933-1010

### Hotel Accommodations:

For overnight accommodations please contact the hotel at 306-933-1010

Standard Guest Room: \$119/night + GST

King + Sofa: \$139/night + GST

Suites - King: \$179/night + GST

Suites - 2 Queens: \$199/night + GST

**Be sure to advise them that you are under the "Mechanical Contractors Association of Canada (MCAC)" room block to obtain special room discounts.** Deadline for making reservations is **April 15th, 2016.**

After that time, rooms are subject to availability and will no longer be at the conference rate.

### Brought to you by:

Mechanical Contractors Association of Canada  
Mechanical Contractors Association of Saskatchewan  
Construction Education Council

### JACK WILHELMI



John (Jack) B. Wilhelmi is President Emeritus of the Omaha Division of The Waldinger Corporation. Wilhelmi has served Waldinger for forty years, the first ten years as VP of Estimating and the last thirty as a Division President. During the last year as Vice President of Estimating, he supervised the bidding of over one billion dollars of mechanical work (present day dollars). Wilhelmi is a past President of the MCAA having served as its National President in 2008 and 2009.

### TIM WENTZ Professor, University of Nebraska



Professor Wentz graduated from the University of Nebraska with a BS degree in Mechanical Engineering and a Master's degree in Business Administration. He then went on to work in the family mechanical contracting firm. He spent 19 years in the industry, before entering academia. Wentz has received numerous awards for his teaching and service to the HVAC industry including the Distinguished Service Award, MCAA's highest award and he is the current President of ASHRAE.

### DAN LEDUC Partner, Norton Rose Fulbright



Mr. Leduc practices primarily construction law and commercial litigation. Within construction law, he is frequently called upon to advise and represent owners, engineers, subcontractors, suppliers and builders in such front-end services as contract review, tender issues and general construction matters, as well as in litigation and arbitration.

# SCHEDULE OF EVENTS



## MONDAY, MAY 9

2:00 PM – 3:00 PM Registration Opens

**3:00 PM – 3:30 PM** Jack Wilhelmi  
**Opening and Process Flow**

The opening presentation will show the importance of a defined, repetitive process not a new work of art each time an estimate is prepared. The presentation will also show how the “proposal” is used as a sales tool not just a required form. The flow diagram also demonstrates the need for feedback and communication to and from operations.

**3:30 PM – 4:00 PM** Tim Wentz  
**Company Branding and Team Building**

This short presentation talks about how the course achieves its educational goals through team-based learning and the importance of establishing a brand. All organizations have a brand and it is critical that the brand of the organization projects the intended message to both clients and the industry.

**4:00 PM – 6:00 PM** Dan Leduc  
**Deal Breakers**

Deal Breakers - where to look for deal breakers, how to fix the deal breakers and the importance of dealing with them before the day of the bid will be demonstrated and discussed. How to avoid the discovery of a “deal breaker” the night before the bid is due and taking the risk rather than solving with proposed language or making the decision not to bid.

**6:30 PM**  
**Dinner Function - Sponsored by MCA Saskatchewan**

## TUESDAY, MAY 10

7:00 AM – 7:30 AM – Breakfast

**7:30 AM – 8:30 AM** Jack Wilhelmi  
**Budget Request and Modular Estimating**

Most requests for proposal begin with a budget request of some form or another. This conference will begin in the same fashion. Included in this discussion will be an explanation of modular estimating, which is a simple process to quickly determine preliminary budgets to satisfy the client’s budget request and is also an important part of the decision to bid.

**8:30 AM – 9:30 AM** Tim Wentz  
**Project Risk and Go/No Go Strategies**

The project risk presentation explores the types of risks that typically occur on a construction project and how a project acquisition team can mitigate those risks through a company – wide Go/No Go Strategy. The presentation discusses “hard” risks versus “soft” risks, the “Risk/Reward” ratio, available risk management tools and how a strategic Go/No Go plan can provide a consistent method of addressing these risks.

**9:30 AM – 9:45 AM Coffee Break**

## TUESDAY, MAY 10

**9:45 AM – 12:00 PM** Jack Wilhelmi  
**A Day in the General Contractors Bid Room**

This exercise will give each team member the opportunity to experience a General Contractor’s Bid Room at the final hour in a very realistic setting. They will analyze various mechanical bids and select the low number to use at the appointed time. Time will be limited, actual proposals and documents are used and the results will be posted. The Teams will have the opportunity to walk in our customer’s shoes.

**12:00 PM – 1:00 PM Lunch**

**1:00 PM – 2:30 PM** Tim Wentz  
**How a Client Decides**

This presentation explores how people make decisions based upon how our brains are wired and constructed. Using that information as a foundation, strategies and tactics are investigated to generate a competitive advantage in the writing of proposals as well as in negotiating sessions.

**2:30 PM – 2:45 PM Coffee Break**

**2:45 PM – 6:00 PM** Jack Wilhelmi  
**Proposal and Exercise**

This session will demonstrate the importance of the proposal as a sales tool as well as a plan and definition of your estimate. The teams will prepare and submit a proposal for the case study. The importance of the timing of the preparation of the proposal, at the beginning of the acquisition process rather than the end, will be clearly documented.

**6:30 PM**  
**Social Function – Hudson’s Canadian Tap House**  
**Sponsored by Victaulic Company of Canada**

## WEDNESDAY, MAY 11

7:00 AM – 7:30 AM – Breakfast

**7:30 AM – 10:15 AM** Jack Wilhelmi  
**Final Summary**

The final summary process will be discussed as a tool that does much more than total the price. Like the proposal, the final summary should be prepared well in advance of the due date for the proposal. The final summary becomes a process that is repetitive, not a brand new spreadsheet for each bid, and includes many standard checklists and a project schedule.

**10:15 AM – 10:30 AM Coffee Break**

**10:30 AM – 11:30 AM** Tim Wentz  
**Effective Turnover Meetings**

This session will teach you what a turnover meeting is and the roles and responsibilities of the estimator/acquisition team.

**11:30 AM – 12:30 PM Lunch**

**12:30 PM – 4:00 PM** Jack Wilhelmi/Tim Wentz  
**Presentations**

Each team will present their priced proposal to the presenters in a lifelike sales situation.



# REGISTRATION FEES AND DEADLINE INFO

## 3 WAYS TO REGISTER:

### ONLINE

[www.constructioneducation.ca](http://www.constructioneducation.ca)  
or scan and email to  
tania@mccac.ca  
constructioneducation.ca

### FAX

Complete form and fax to  
613-235-2793

### MAIL

Complete the form and mail with  
payment to: CEC  
601-280 Albert St.  
Ottawa, ON K1P 5G8

## PAYMENT INFORMATION

	Early Bird On or Before April 15	Regular On or After April 16
<b>Registration Fee</b> Fee covers all meals, breaks, receptions, and conference materials	<b>\$1095</b>	<b>\$1295</b>
<b>MCA Non-Member</b> Fee covers all meals, breaks, receptions, and conference materials	<b>\$1495</b>	<b>\$2295</b>
<b>Companion</b> Fee covers all meals and receptions	<b>\$295</b>	<b>\$495</b>
<b>Non – Member Companion</b> Fee covers all meals and receptions	<b>\$495</b>	<b>\$695</b>

### EARLY BIRD DISCOUNT

Early Bird Discounts are applicable until April 15th.  
Registration must be completed that date or postmarked.

### CANCELLATION POLICY:

If it becomes necessary to cancel your participation in the conference, please send written notification to Tania Johnston, Executive Director, at CEC as soon as possible. Please note the following refund information:

No refunds will be granted if cancelled after April 25, 2016.

Substitutions are always accepted.

## QUESTIONS?

Please visit [www.constructioneducation.ca](http://www.constructioneducation.ca), call 613-232-5169  
or email [tania@mccac.ca](mailto:tania@mccac.ca).

### METHOD OF PAYMENT

Registrations cannot be processed without payment.  
Methods of payment include cheque,  
MasterCard, Visa, American Express or by Invoice.

MCAC B.I.N. #124973520

All prices are in CDN dollars.

**CLASS SIZE IS LIMITED TO 30**  
**Register early to avoid disappointment**

