5th EPC Contract & Risk Management

Maximizing Stakeholder Cohesion and Collaboration throughout Project Lifecycles to Mitigate Risk and Optimize Organizational Outcomes

September 12-14, 2017
Houston, TX

More Registration Details. Click Here!

Pre-Conference Workshops: September 12, 2017
Workshop A: Being Creative to Ensure Effective Collaboration Methods with All Stakeholders with TechnipFMC
Workshop B: Anticipating Insurance Costs Based on Risk Profile and Asset Protection with Noble Energy

Attending This Premier marcus evans Conference Will Enable You To:
• Utilize progressive contract formats to their best potential with Burns & McDonnell
• Set realistic expectations between owner and contractor at the onset of the contract cycle with Entergy and Phillips 66
• Streamline project protection by incorporating owner-controlled insurance policy (OCIP) successfully with CITGO
• Resolve change management to maximize success by anticipating costs, minimizing disputes, and maintaining goals with Fluor and Great Lakes Environmental & Infrastructure
• Anticipate project breakdowns to minimize scope creep and overcome project variance with AECOM

Who Should Attend:
marcus evans invites VPs, Directors, Managers, Engineers, General Counsel, Associate General Counsel, Senior In House Counsel, and similar from the Oil & Gas, Power, Process & Industrial, Mining, Construction and similar industries with responsibilities or involvement in:
• Contract Management / Drafting / Negotiation
• Procurement / Supply Chain / Sourcing
• Project Management / Operations
• Capital / Mega / Large / Major Projects
• Category Management / Insurance Management

Current EPC Contract and Risk Management Expert Speakers Include:
Jeff Allen
Vice President,
Regional Practice Manager – Construction, Design / Build
Burns & McDonnell

Tracy Baker
Director of Commercial Contract Management
Duke Energy

Dan Thorsen
Contracts and Subcontracts Manager
AECOM

Paul Morgan
Senior Vice President and Chief Contracting Officer
Great Lakes Environmental & Infrastructure

Bill Meyn
Senior Counsel
Jacobs Engineering Group

Curtis Culver
Senior Counsel-Projects
Phillips 66

Brian Davidson
Senior Legal and Compliance - Onshore
TechnipFMC

Bilge Astarlioglu
Director of Contracts and Controls, Global Engineering & Construction
The AES Corporation

Chaitali Dave
Director Strategic Sourcing
Phillips 66

Michael Zakarian
SCM Director,
Major Gas Projects
Enbridge, Inc.

Al Hankins
Principal Vice President and Manager of Corporate Contracts
Bechtel Global Corporation

Shaw Ottis
Vice President
& Deputy General Counsel
Freeport LNG

Jason Phillips
Manager of Procurement
Entergy

Meredith Anderson
Senior Manager, Supply Chain – Global Contracts
McDermott International

Karon Fischer
Assistant Risk Manager
CITGO

Cecilia Ibarra-VanOostenrijk
Senior Legal and Compliance Counsel-Mexico
TechnipFMC

Cesar Hernandez
Senior Counsel & Legal Manager
Jacobs Engineering Group

Rob Howard
Contracts Manager
Fluor

Arthur L. Bryan II
Project Legal
Bechtel Oil, Gas, and Chemicals Inc.

Josh Farkas
Senior Counsel
Calpine

Holly Chastain Nini
Senior Corporate Counsel
CITGO

David Gresco
Risk & Insurance Manager
Noble Energy

Kurt Inza
Senior Risk and Insurance Manager
EDP Renewables
North America

Construct Successful Projects through Lessons Learned in Drafting, Negotiating, Formulation, Insurance Coverage, and Execution

Build Robust Contracting, Procurement, and Supply Chain Strategies with Balanced Liability and Risk for the Owner, Contractor, Subcontractor, and All Stakeholders.

Current EPC Contract and Risk Management Expert Speakers Include:
Jeff Allen
Vice President,
Regional Practice Manager – Construction, Design / Build
Burns & McDonnell

Tracy Baker
Director of Commercial Contract Management
Duke Energy

Dan Thorsen
Contracts and Subcontracts Manager
AECOM

Paul Morgan
Senior Vice President and Chief Contracting Officer
Great Lakes Environmental & Infrastructure

Bill Meyn
Senior Counsel
Jacobs Engineering Group

Curtis Culver
Senior Counsel-Projects
Phillips 66

Brian Davidson
Senior Legal and Compliance - Onshore
TechnipFMC

Bilge Astarlioglu
Director of Contracts and Controls, Global Engineering & Construction
The AES Corporation

Chaitali Dave
Director Strategic Sourcing
Phillips 66

Michael Zakarian
SCM Director,
Major Gas Projects
Enbridge, Inc.

Al Hankins
Principal Vice President and Manager of Corporate Contracts
Bechtel Global Corporation

Shaw Ottis
Vice President
& Deputy General Counsel
Freeport LNG

Jason Phillips
Manager of Procurement
Entergy

Meredith Anderson
Senior Manager, Supply Chain – Global Contracts
McDermott International

Karon Fischer
Assistant Risk Manager
CITGO

Cecilia Ibarra-VanOostenrijk
Senior Legal and Compliance Counsel-Mexico
TechnipFMC

Cesar Hernandez
Senior Counsel & Legal Manager
Jacobs Engineering Group

Rob Howard
Contracts Manager
Fluor

Arthur L. Bryan II
Project Legal
Bechtel Oil, Gas, and Chemicals Inc.

Josh Farkas
Senior Counsel
Calpine

Holly Chastain Nini
Senior Corporate Counsel
CITGO

David Gresco
Risk & Insurance Manager
Noble Energy

Kurt Inza
Senior Risk and Insurance Manager
EDP Renewables
North America

EARN UP TO 16 HOURS OF CLE CREDITS!
Pre-Conference Workshops | Tuesday, September 12, 2017

12:00 Registration
12:30 Pre-Conference Interactive Workshop A

**Being Creative to Ensure Effective Collaboration Methods with All Stakeholders**

There is no standard operating procedure for communication during the EPC process, which can lead to contractors, owners, and law firms having different levels of access to communication tools and cultural nuances, particularly for internationally diverse stakeholders. But, this doesn’t mean they can’t Collaborate effectively. Understanding differences in techniques and applying out-of-the-box communication skills can bridge the gap between questions and answers.

This interactive workshop will provide you with the tools and strategies to:

- Identify and transition smoothly to tech for project controls, management, and logistics
- Evaluate compliance software and technology to increase effective collaboration
- Avoid approval line flaws to maintain a thoughtful EPC process
- Communicate thoughtfully with technology to maintain relationships with contractors and subcontractors
- Bridging gaps that could emerge for varying approaches to electronic document management and system transitions

**Cecilia Ibara-VanOostenrijk**, Senior Legal and Compliance Counsel-Mexico, TechnipFMC

2:30 Networking Break

3:00 Pre-Conference Interactive Workshop B

**Anticipating Insurance Costs Based on Risk Profile and Asset Protection**

Obtaining insurance is one of the most obvious steps when planning a project. Typically, potential factors such as property damage or force majeure are considered, but it’s important to understand and implement any potential options that could fit the project. Insurance should be as unique and thought out as each project.

This interactive workshop will provide you with the tools and strategies to:

- Sift through the jargon to access viable insurance options during implementation
- Mitigate construction warranty risks by drafting effective performance warranty terms
- Understand builder’s risk insurance language to access optimal coverage
- Manage risk during construction to maintain project success
- Utilize specialized policies to cover risks associated with cyber crime

**David Gresko**, Risk & Insurance Manager, Noble Energy

5:00 End of Pre-Conference Workshops

Day One | Wednesday, September 13, 2017

7:30 Registration and Morning Coffee
8:10 Safety Briefing
8:15 Chairperson’s Opening Address

**UTILIZING EFFECTIVE PREPERATION AND DRAFTING TECHNIQUES TO ACHIEVE OPTIMAL RESULTS**

8:30 Joint Discussion

**Setting Realistic Expectations Between Owner and Contractor at the Onset of the Contract Cycle**

- Strategizing and preparing before drafting the request for proposals (RFP) to initiate effective collaboration
- Maintaining preparatory strategy to prevent negotiation vulnerability caused by lowballing
- Identifying the scope of work to manage expectations and goals
- Utilizing talent strengths to accomplish goals within the scope of work
- Stratagizing priorities of projects to get the most out of project phases

**Jason Phillips**, Manager of Procurement, Entergy

9:20 Focusing on Priorities during RFP Drafting and Negotiation to Get the Most Out of Project Execution

- Setting and maintaining expectations during RFP negotiations
- Identifying and analyzing risk while shaping the proposal
- Making the process smoother by coming together as a united front
- Using due diligence to understanding roles, strengths, and dynamics between stakeholders

**Al Hankins**, Principal Vice President and Manager of Corporate Contracts, Bechtel Global Corporation

10:10 Networking Break

10:40 Interactive Panel Discussion

**Selecting the Best Contract Strategy to Ensure a Best-Case Scenario During Negotiation**

- Adopting an appropriate contract strategy to reach realistic goals
- Identifying appropriate time schedules to avoid lost time on projects
- Capitalizing the experience and knowledge of counsel and EPC firms to make a focused plan
- Preventative process streamlining in order to work smarter
- Keeping final design in mind while negotiating with contractors

**Bill Meyn**, Senior Counsel, Jacobs Engineering Group

11:30 Utilizing Progressive Contract Formats to Their Best Potential

- Seamlessly instigating an open book estimate (OBE) to convert to a lump sum turnkey (LSTK)
- Minimizing project risk with progressive alternatives
- Introducing requirements to progressive contracts without creating rifts in the project timeline
- Knowing what to look for in a project management team and assisting specialists

**Al Hankins**, Principal Vice President and Manager of Corporate Contracts, Bechtel Global Corporation

12:20 Luncheon
Day One | Continued

Day Two | Thursday, September 14, 2017

7:45  Registration and Morning Coffee
8:10  Safety Briefing
8:15  Chairperson’s Opening Address

EVALUATING LIABILITY, INDEMNITY, AND INSURANCE TO PROTECT PROPERTY, PROJECTS, AND PERSONNEL

8:30  Adopting Effective Contractual Solutions to Overcome Financial, Operational, and Legal Risk
- Streamlining project delivery methods to implement risk safeguards quickly and effectively
- Strengthening protection breadth in emerging marketplaces
- Maintaining control of stakeholder contract agreements to prevent project headaches
- Drafting liability policies around developing case law and anti-indemnity statutes to ensure coverage
- Identifying EPC-related insurance policies to build up project toolbox

Kurt Inza, Senior Risk and Insurance Manager
EDP Renewables North America

9:20  Comprehending Liability and Indemnity Options to Determine Pros and Cons
- Determining which risks should be subject to liability caps
- Exploring alternative formats of contracts
- Including mutual indemnity as an insurance option
- Understanding and preparing for anti-indemnity statutes to use for advantage
- Using exclusive remedy clauses as a method of limiting liability

Curtis Culver, Senior Counsel-Projects
Phillips 66

10:40  Tapping into Talent: How Counsel Can Shape Successful Projects
- Leveraging counsel as advocates from the onset of the project lifecycle
- Adding value to projects by embracing the role of counsel as strategic enablers and business leaders
- Analyzing successful incorporation of counsel involvement by non-counsel when there is questionable scope growth or creep
- Encouraging rapid continuous improvement by communicating with counsel to integrate solutions

Brian Davidson, Senior Legal and Compliance – Onshore
TechnipFMC

EDP Renewables North America

Navigating Change Management and Negotiation by Readyng Solutions

1:20  Pioneering Project Strategy during Drafting and Negotiation to Minimize Disputes and Change Orders
- Clearly defining expectations to avoiding communication breakdowns and timeline disruption
- Utilizing EPC firms as more than a middle man
- Balancing expectations while keeping contractors to task in order for projects to remain mutually beneficial
- Selecting the right contractors to avoid project headaches
- Offseting slowdown impact to stay on the course of success

Bilge Astarlioglu, Director of Contracts and Controls, Global Engineering & Construction
The AES Corporation

2:10  Resolving Change Management to Maximize Success by Anticipating Costs, Minimizing Disputes, and Maintaining Goals
- Anticipating and controlling costs efficiently to increase profits
- Streamlining change order processes to get a project back on track
- Differentiating destructive and constructive disputes to minimize unresolved conflict disputes.
- Focusing on lowering costs to maintain goals during change management

Rob Howard, Contract Manager
Fluor

Paul Morgan, Senior Vice President and Chief Contracting Officer
Great Lakes Environmental & Infrastructure

3:00  Networking Break

3:30  Adapting Negotiation and Procurement Strategy to Shifts in Supply, Demand, and Economic Fluctuations
- Developing a strong category management plan
- Examining how contracts examine market trends before and during contract negotiations to understand power dynamic changes
- Prioritizing desirable contract terms with changing labor and materials availability
- Increasing trust between contractors and owners despite shifts in negotiating power

Michael Zakarian, SCM Director, Major Gas Projects
Enbridge, Inc.

4:20  Streamlining Project Protection by Incorporating OCIP Successfully
- Identifying internal cues before implementing owner controlled insurance policy
- Structuring claim management to minimize project costs
- Closing potential gaps in coverage by maximizing direct policy design input
- Speeding up insurance implementation to launch project execution sooner
- Analyzing the pros and cons of rolling vs. maintenance types

Holly Chastain Nini, Senior Corporate Counsel
CITGO

Karon Fischer, Assistant Risk Manager
CITGO

5:10  Closing Remarks of the Chair & End of Day One
12:20 Luncheon

1:20 Joint Discussion

**Selecting the Right Contractors, Subcontractors, and Third Parties through Effective Due Diligence to Maximize Relationships and Optimize Capacity**
- Matching potential contractors to matching contract strategies
- Acquiring the best possible talent to be proactive from the initial pitch
- Contracting with a company with a potential of bankruptcy
- Applying due diligence during mergers and acquisitions
- Working with Joint Ventures effectively

**Josh Farkas**, Senior Counsel
Calpine

*Cecilia Ibarra-VanOostenrijk*, Senior Legal and Compliance Counsel-Mexico
TechnipFMC

2:10

**Incorporating Lessons Learned Post-Litigation into your Terms and Conditions to Minimize Risk in Future Projects**
- Maintaining success and reputation post-litigation to optimize past and future stakeholder and client participation
- Balancing and resolving diverse disputes, from personal injury to operation disruption
- Overcoming contract litigation between any stakeholders or third parties
- Communicating and engaging with project stakeholders after crisis

**Cesar Hernandez**, Senior Counsel & Legal Manager
Jacobs Engineering Group

3:00 Networking Break

3:30

**Ensuring Remote Project Safety and Success Despite Risks**
- Highlighting potential insurance provisions for remote locations
- Creating a crisis management plan in case of sabotage or terrorist threats
- Overcoming geopolitical turmoil that affects labor and supply availability
- Overcoming exchange rate risk and currency fluctuations
- Installing stabilization clauses into contracts to provide stronger protection on international projects

**Rob Howard**, Contract Manager
Fluor

4:20

**Anticipating Project Breakdowns to Minimize Scope Creep and Overcoming Project Variance**
- Utilizing unique contracting methodology to minimize scope creep with scheduling and change order management
- Establishing fix unit rates, schedules of values and change request processes to minimize scope creep
- Pioneering the usage of master project agreements and individual project agreements to exceed owner expectations and manage subcontractors
- Monitoring project developments, scope, and cost fluctuations with daily conference calls with the contracted and owner project managers

**Dan Thorsen**, Contracts and Subcontract Manager
AECOM

5:10 Closing Remarks of the Chair & End of the Conference

**WHY YOU SHOULD ATTEND:**

Industrial and Mega Projects carry a large amount of risk. When all stakeholders collaborate effectively with their contract management it yields large mutual gains and rewards for all stakeholders.

This premier *marcus evans* conference will provide attendees with insights and proactive strategies on how to address financial challenges, manage disputes, balance liability, and rise above project slowdown while maintaining strong, thoughtful relationships with team members, partners, and third parties.

**TESTIMONIALS:**

“...an outstanding forum for collaboration & sharing key elements that contribute to the improvement & successful outcomes in the EPC Industry.”

**CCC Group**

“This is a strong gathering of experts willing to share their experiences and lessons learned.”

**Magnolia LNG**

“I really enjoyed the interactive sessions of the presentations and openness of the training.”

**McDermott**

“Tremendous speakers with new takes on current topics in the EPC contracting arena”

**Triten Corporation**

“Valuable information and an opportunity toendor a peer networking group”

**Gemma Power:**

**WATCH VIDEO TESTIMONIALS**

**CONTINUING LEGAL EDUCATION**

*marcus evans* has requested CLE accreditation from all appropriate states.

*marcus evans* certifies that this conference has been pre approved for CLE credits by the Pennsylvania, California and West Virginia State continuing legal education authorities and also approved for New Jersey and Colorado CLE credits via reciprocity.

To qualify for CLE credits you are required to sign-in with your state bar number for every conference day that you are in attendance. CLE credits are subject to final approval from the individual state boards and certificates will be issued 6-8 weeks after the conference is held.

**DISCLAIMER**

This agenda may be subject to change for reasons outside of our control. Marcus Evans, Inc. reserves the right to replace, substitute, or remove any speaker in the event of an emergency or any unforeseen situation in which a confirmed speaker is unable to attend the event. Marcus Evans, Inc. will make every effort possible to substitute a speaker in this circumstance with an equally qualified professional for the confirmed presentation. However, Marcus Evans, Inc. does not guarantee the possibility of replacement.

**LET US BRING THE TRAINING TO YOU!**

*marcus evans In-House Training* – Tailored solutions to meet your company’s specific needs

*Exceptional Trainers:* Annual global course portfolio over 3000 events a year guarantees access to the world’s best trainers.

*Custom designed:* Your team provides input into content and delivery through survey and consultation with trainers to match your unique training needs.

*Confidentiality:* Your team may talk openly about their experiences and organizational needs in a secure and confidential environment.

*Cost-effective:* Maximize your budget by cutting out travel and lodging expenses while also maximizing employee productivity and saving time.

*Any Training, Anytime, Anywhere*

For full information on open enrollment and in-house training go to www.marcusevanspt.com or contact Emily Jones at emilyj@marcusevansch.com.