

NASBP RISK WORKSHOP Analyzing Risk and Understanding the Bid Process

October 12 -14, 2010 • Loews Coronado Bay Resort • San Diego, CA

NASBP Member/Affiliate/Associate \$1190 • Non-Member/Affiliate/Associate \$2380

Name: _____

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Mail completed form and payment to: **NASBP**
P.O. Box 79954
Baltimore, MD 21279-0954

National Association of
Surety Bond Producers
1828 L Street, N.W.
Suite 720
Washington, DC 20036-5104



**Register
Today!
nasbp.org**

General Information

Workshop Fees

\$1190 NASBP Member/Affiliate
\$2380 Non-Member/Non-Affiliate

Fees include all meeting materials, an opening reception, daily continental breakfast, coffee/refreshment breaks, graduation brunch, and a certificate of completion.

To Register

Online at nasbp.org/calendar

By Mail – Return the completed registration form, along with your check to:

NASBP
P.O. Box 79954
Baltimore, MD 21279-0954

Hotel Reservations

Workshop participants are responsible for making their own hotel reservations at **The Loews Coronado Bay Resort** at (619) 424-4000. NASBP has secured a discounted rate of \$199 single/double (plus tax) for the workshop participants. You **MUST** identify yourself as an NASBP Risk Workshop participant when making your reservation to receive this special rate.

Hotel Reservations should be made prior to **Monday, September 20** to receive the special NASBP discounted rate.

Continuing Education Credit

The amount of continuing education credit awarded varies by state. Contact NASBP Professional Development at 202-686-3700 for specific state information.

Workshop Cancellation Policy

All cancellations or substitutions must be made in writing. For a full refund, less processing fee, a written cancellation must be received 30 calendar days prior to the start of the workshop. Cancellations received between 15 – 29 calendar days prior to the workshop are eligible for a 50% refund. Cancellations received less than 15 calendar days prior to the workshop are not eligible for refunds.

Questions?

Please call NASBP Professional Development at 202-686-3700.

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October 12 -14, 2010
Loews Coronado Bay Resort
San Diego, California

**NEW
Location!**



Overview

This interactive workshop provides a comprehensive overview of the risk environment that construction contractors deal with today. The workshop explores how risk considerations influence the bidding process, contract conditions/elements, and pricing.

The workshop faculty is comprised of recognized industry experts in construction risk, who will share their insights and answer your questions. In addition, participants will have the opportunity to work in small groups with their peers to deepen their understanding of the topics presented during the workshop.

Who Should Attend?

- Bond Producers
- Bond Managers
- Bond Department Service and Support Personnel
- Surety Underwriters
- Property and Casualty Underwriters

Workshop Objectives

Gain the contractors' perspective on:

- Making Bid Decisions
- Direct versus Overhead Costs
- The True Cost of Running a Job
- The Assessment of Contractual Risk
- Unforeseen Conditions
- Insurance Clauses
- Quantifying the Inherent Risks of a Job



Workshop Schedule

TUESDAY

7:30 – 8:00 a.m.	Continental Breakfast
8:00 – 8:45 a.m.	Introduction and Course Overview
8:45 – 9:30 a.m.	Ten Steps to a More Profitable Construction Company
9:30 – 10:00 a.m.	Group Exercise—Fiscal Impact Analysis
10:00 – 10:15 a.m.	Refreshment Break
10:15 – 10:30 a.m.	Exercise Review
10:30 – 11:30 a.m.	Best Practices Estimating
11:30 a.m. – 12 noon	Pre-Bid Meeting Review of Job and Bid Requirements
12 noon – 1:00 p.m.	Lunch in Groups
1:00 – 3:00 p.m.	Construction Contracts Overview of Standard Contracts Used by Builders
3:00 – 3:15 p.m.	Refreshment Break
3:15 – 5:00 p.m.	Construction Insurance Requirements
5:00 – 5:30 p.m.	Wrap-up
6:00 – 7:00 p.m.	Welcome Reception

WEDNESDAY

7:30 – 8:00 a.m.	Continental Breakfast
8:00 – 8:45 a.m.	Reading Blueprints & Specifications
8:45 – 9:30 a.m.	Group Exercise—Blueprints & Specifications
9:30 – 9:45 a.m.	Refreshment Break
9:45 – 10:15 a.m.	Exercise Review
10:15 – 10:45 a.m.	Subcontractor Qualifications RFP & Subcontractor Documents/ Subcontractor Role Play

10:45 – 11:45 a.m.	Group Exercise—Evaluate Subcontractor Pricing and Submit RFIs
11:45 a.m. – 12 noon	Morning Review
12 noon – 1:00 p.m.	Lunch in Groups
1:00 – 1:45 p.m.	Project Risk
1:45 – 2:45 p.m.	Group Exercise—Dealing with Addenda
2:45 – 3:15 p.m.	Markup versus Margin—Breakeven Analysis
3:15 – 3:30 p.m.	Refreshment Break
3:30 – 4:00 p.m.	Q&A Session
4:00 – 5:00 p.m.	Group Exercise Final Proposal Preparation
5:00 p.m.	Final Bids Due from Groups
5:00 – 5:15 p.m.	Group Exercise Presentation Preparation
5:15 – 5:30 p.m.	Wrap-up

THURSDAY

7:00 – 7:30 a.m.	Continental Breakfast
7:30 – 8:30 a.m.	Group Presentations
8:30 – 9:30 a.m.	Company Risk
9:30 – 9:45 a.m.	Refreshment Break
9:45 – 11:00 a.m.	Bid Review & Roundtable Discussion
11:00 – 11:15 a.m.	End of Workshop Exercise
11:15 – 11:30 a.m.	Bid Award Presentation
11:30 – 12:30 p.m.	Graduation Brunch & Awarding of Certificates

Workshop Faculty

BRIAN WASSERMAN

Mr. Brian Wasserman is an Assistant Professor in the Construction Management Department at Minnesota State University, where he instructs Estimating and Scheduling. He holds an adjunct faculty position at the University of Minnesota and is President of Leading Change, Inc., a construction consulting firm. Brian has been involved in the construction industry for more than 25 years through a family-run sheet metal business. He serves as the lead instructor for the NASBP Risk Workshop.



LESLIE SHINER

Ms. Leslie Shiner, author, speaker, and trainer, has more than twenty years experience as a financial and management consultant for the construction industry. She is the owner of The ShinerGroup, a consulting firm helping contractors better understand their business practices and maximize profits. Leslie is also the author of numerous articles and publications including *A Simple Guide to Turning a Profit as a Contractor*. She is an engaging speaker with a long history of rave reviews. She continues to receive high praise for her ability to make financial management interesting, understandable, and even entertaining.



DAVID A. CASTILLO

Mr. Castillo is with Alliant Insurance Services, Inc. where he oversees the construction practice for both surety and property/casualty in their Las Vegas, Nevada office. David began his career with Bank of America in Sacramento, California as a commercial loan officer in 1983. In his positions in banking and insurance, he has consulted with many construction companies helping them to secure financing and bonding. He is Chairman, NASBP Professional Development & Education Committee and has been a faculty member at the NASBP William J. Angell Surety School since 2001. He also serves on the NASBP Government Relations Committee and the NASBP Risk Management & Insurance Committee.



J. WILLIAM ERNSTROM

Mr. J. William Ernststrom is Vice President for Major Strategic Projects for The Walsh Group, an ENR Top 15 National Construction Contractor. Formerly Bill was the General Counsel of Alberici Corporation. He was the founding partner in the law firm of Ernststrom & Drete, LLP. For over 25 years, he focused his practice on the construction and surety industries. For over 15 years Bill was responsible for the Contract Documents Program of the Associated General Contractors of America. During that time Bill led the industry effort that developed the ConsensusDOCS and was the lead AGC member in dealing with the AIA on the 1997 and 2007 A201 contract documents. Mr. Ernststrom is the co-editor of the "AGC Contractor Documents Handbook". He has authored numerous articles on a variety of surety and construction law topics and has been a frequent presenter at industry events.



MARK H. MCCALLUM

Mr. Mark McCallum is Chief Executive Officer of the National Association of Surety Bond Producers. He previously served as the association's general counsel and director of government affairs, heading its government relations, industry relations, legal, and other functions. Prior to joining NASBP, Mr. McCallum was Senior Counsel & Executive Director of Programs and Industry Relations with the Associated General Contractors of America, and Associate Counsel with American Institute of Architects.

