



WT

WT INSIGHTS

ESSAYS & THOUGHT LEADERSHIP
FROM CONSTRUCTION EXPERTS

PREPARED BY SENIOR VICE-PRESIDENT JON BAWDON

WT IS AN AWARD-WINNING INTERNATIONAL CONSULTANCY FIRM WHO SUPPORTS CLIENTS ACROSS THE INFRASTRUCTURE INVESTMENT, BUILDING, CONSTRUCTION AND ASSET MANAGEMENT SECTORS.

WT was founded in Australia back in 1949 and has been a force in North America since 2010. A trusted advisor to Owners, Developers, Government and Private sector clients, WT currently manages billions of dollars of active mega projects across North America.

WT draws on the collective experience, knowledge and capability of our professional staff in locations across North America and globally to provide our clients with the right advice on all aspects of cost, value and risk to assist in achieving optimum commercial outcomes.

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CONNECT WITH OUR GLOBAL NETWORK AT WTPARTNERSHIP.CO

AUSTRALIA, CANADA, CHINA, GERMANY, HONG KONG, INDIA, INDONESIA, ITALY, MACAU, MALAYSIA, MEXICO, NEW ZEALAND, SINGAPORE, SPAIN, SWEDEN, THAILAND, UAE, UNITED KINGDOM, UNITED STATES AND VIETNAM.

OUR FOOTPRINT

13

NORTH AMERICAN OFFICES

- | | | |
|---|------------------------------|------------------------------|
| UNITED STATES
Austin, TX
Boston, MA
Cincinnati, OH
Denver, CO
Honolulu, HI
Los Angeles, CA
New York, NY
Phoenix, AZ
Raleigh, NC
San Francisco, CA
Seattle, WA | CANADA
Toronto, ON | MEXICO
Mexico City |
|---|------------------------------|------------------------------|

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GLOBAL OFFICE LOCATIONS

- | | | | |
|---|--|---|--|
| OCEANIA

AUSTRALIA
Adelaide
Brisbane
Cairns
Canberra
Geelong
Gold coast
Hobart
Melbourne
Perth
Sydney

NEW ZEALAND
Auckland
Wellington
Christchurch | ASIA

CHINA
Beijing & Tianjin
Shanghai & Hangzhou
Guangzhou & Shenzhen
Chongqing & Wuhan
Suzhou
Chengdu

HONG KONG

INDONESIA
Jakarta
Jogjakarta
Bali

MACAU

MALAYSIA
Kuala Lumpur

SINGAPORE

THAILAND
Bangkok

VIETNAM
Ho Chi Minh City
Hanoi | UK & EUROPE

UK & CHANNEL ISLANDS
Belfast
Birmingham
Cambridge
Exeter
Guernsey
Leeds
London
Manchester
Nottingham
Sheffield
Southampton
Swansea

GERMANY
Stuttgart

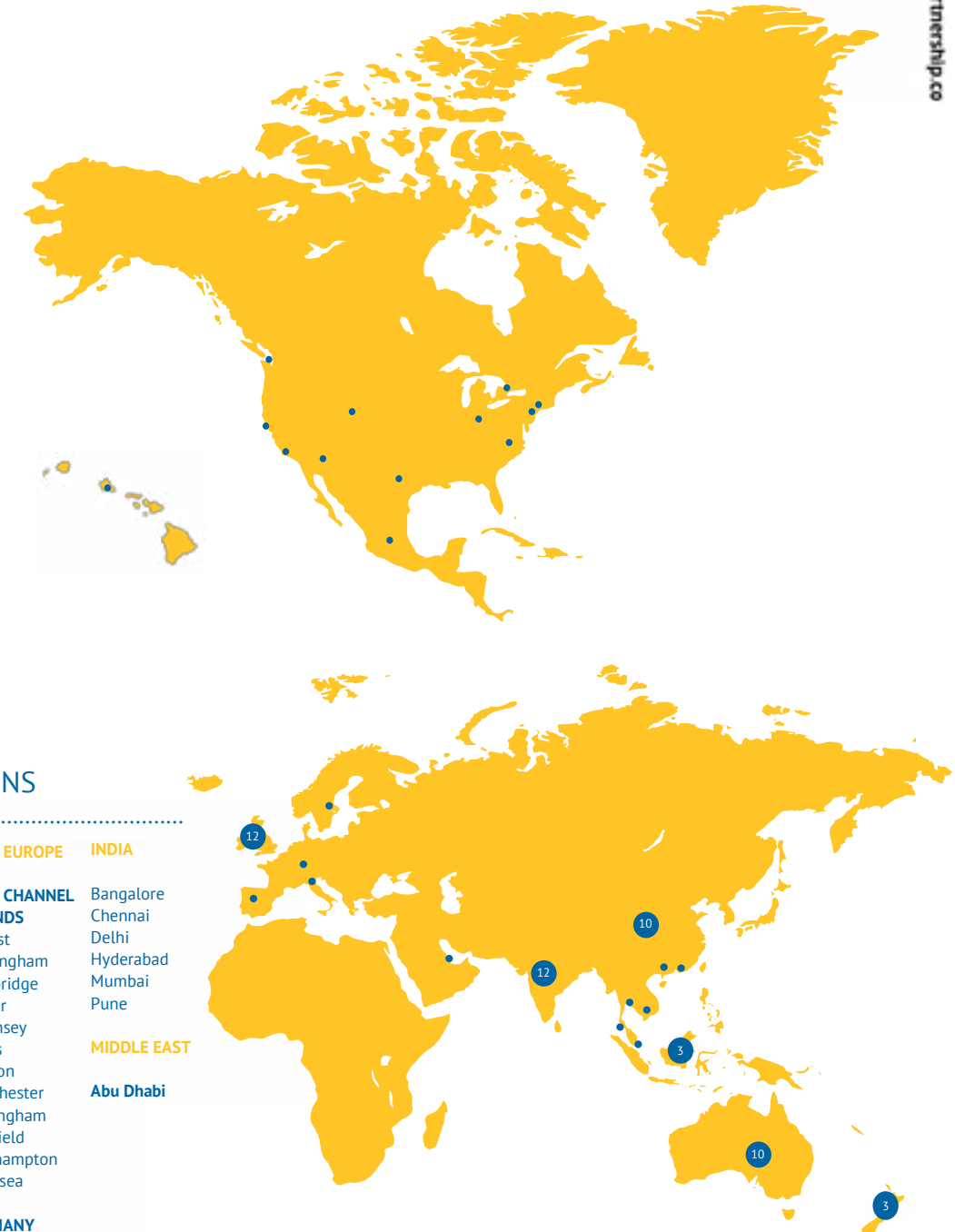
ITALY
Milan

SPAIN
Madrid

SWEDEN
Stockholm | INDIA
Bangalore
Chennai
Delhi
Hyderabad
Mumbai
Pune

MIDDLE EAST

Abu Dhabi |
|---|--|---|--|



EXECUTIVE FOREWORD



PHILIP NIXON
EXECUTIVE VICE-PRESIDENT

The Canadian Marketplace in 2024 presents some very unique challenges and signs of opportunity and recovery in the AEC industry. The following presentation contains a selection of market trend analysis, insights and editorials from WT's roster of experts across our P3 Advisory, Project Management, Project Controls, Real Estate Advisory and Cost Consulting practices, based on observations in the field on active, relevant projects.

On behalf of the entire North American leadership team, it is our hope that you, the reader, find this material timely and enlightening and also see it as a formal invitation for further discourse with our experts across the company.

Included in this document there is a contact sheet with details on engaging several of WT's construction industry professionals across North America.

Thank you for your time and attention and here is to a safe and prosperous 2024.

A handwritten signature in white ink that reads "Philip Nixon".

INDEPENDENT CERTIFICATION

**HOW WE'RE DIFFERENT -
PROVEN TO BE SUCCESSFUL**

PREPARED BY JON BAWDON
SENIOR VICE-PRESIDENT



INDEPENDENT CERTIFICATION – HOW WE’RE DIFFERENT - PROVEN TO BE SUCCESSFUL

JON BAWDON SENIOR VICE-PRESIDENT -
P3 ADVISORY



Jon is one of the most experienced Independent Certifiers in Canada. Based out of WT’s Toronto, ON office, Jon has developed an extensive background in providing mechanical and electrical services on major infrastructure projects.

wtpartnership.co

JON BAWDON

WT

SENIOR VICE-PRESIDENT

ABSTRACT

Testing the status quo challenges “business as usual” and can lead to better ways of doing things, whether it be advising the contracted parties on an amicable path forward that is best for the Project, executing the monthly certification services, or managing closeout processes to support a successful delivery.

The role of the Independent Certifier (IC) is invaluable in that a truly independent third party, appointed by the private and public entities and paid for by both parties, has due diligence solely to the Project.

In upholding the contract, executing the certification services and embodying the ‘partnership’ in public-private partnership (P3), supporting the successful delivery of the Project is the desired and likely outcome. However, poor management and execution of the certification services can play a detrimental role, potentially hindering the fulfillment of the IC’s intent – to advise and support an on-time and on-budget Project delivery with an equal duty of care.

With this in mind, the question is posed – Can a different approach to the execution of the IC role raise the probability of a successful delivery?

The answer – **YES**, by being **DIFFERENT!**

Adopting dissimilar methods as part of the overarching approach to the IC role, implementing distinct closeout management processes and leveraging your team’s diverse and unique skillset will improve outcomes for project stakeholders and increase the probability of a successful delivery.

Upon diving into the industry of risk management, contract management and Independent Certification, most are greeted with a standardized way of doing things, as is the case with most established roles. Testing the status quo challenges “business as usual” and can lead to better ways of doing those things, whether it be advising the contracted parties on an amicable path forward that is best for the Project, executing monthly certification services or managing closeout processes to certify completions successfully. A way to challenge the status quo is by consistently asking, ‘why’ – why are processes the way that they are, why were previous decisions made, and why was the advice provided under the context of the contract? The ability to genuinely take a step back and disentangle from day-to-day tasks, dive into delivery successes, challenges and global lessons learned, actively listen to clients and colleagues throughout the Project and challenge past precedence, can highlight what is working as well as the tangible areas for improvement.

In the execution of the above, WT is proud to offer a successful, quality service to our clients that is **dissimilar, distinct** and **diverse** – ultimately, **DIFFERENT!**

1. OUR UNIQUE APPROACH: Dissimilar, not alike or capable of comparison.

As IC, WT are contracted to monitor all facets of the Project (design, construction progress, schedule, cost and variations etc.), identify and report on potential risks and are proactive initiators, organizers and facilitators of the requirements for Project Completions, including certification of any Phase, Substantial Completion (or Service Commencement) and Final Completion (or Total Completion).



WT has an equal duty of care to both public and private entities, and we choose to lead with **impartiality** and **honesty** and approach the IC role with a pragmatic mindset of **'what is reasonable'** within the current context and confines of the contract. Our input is advised by past precedents, lessons learned, and our out-of-the-box thinking team members, who have proven experience in seeking new solutions to resolve issues and limit risk when the status quo needs to be challenged. Ultimately, we **advise with the Project's best interest in mind** and advocate on behalf of the Project.

A unique process that has proven to benefit all parties is an IC presentation provided during the onset of the Project, preferably at the first or second Works Committee Meeting (WCM) or Construction Period Joint Committee Meeting (CPJC). Acknowledging and commending the many people who work on large infrastructure projects, it is understandable to have persons we report to or interact with regularly not be aware of our critical role or what is expected of them as it relates to project completion. The lack of understanding can impact open lines of communication, limit the parties' availability to expert advice or delay notice

or contractual closeout processes that are critical to a successful delivery. Therefore, our unique IC presentation alleviates this concern as the parties are able to comprehend WT's approach to compliance monitoring right from the start, our availability to them when issues arise or when challenges require resolution and define closeout expectations. In doing so, the parties lean on and trust our expertise, enabling them to focus on day-to-day management, knowing they are both being independently protected without the integrity of the Project being compromised.

Promoting an environment of open communication, solidifying the clients' trust in our quality service, and encouraging accountability by all through set closeout expectations raises the probability of a successful delivery, as proven by WT.

2. OUR CLOSEOUT MANAGEMENT APPROACH: Distinct, not the same in nature or quality.

The IC's certification services are typically included in Schedule 2 or 6 of the contract, and although the services are clearly outlined, our approach to execution is distinct.

A successful Project can be directly tied to a successful closeout process. Therefore, to increase the probability of on-time and on-budget deliveries, WT has developed distinct closeout processes, including a Project Completion Checklist and hosted Project Closeout Meetings to manage completions.

One of our distinct closeout processes includes formulating and executing a 'live document' WT calls the Project Completion Checklist. The deliverable is a line-by-line checklist of extracted contract requirements as well as select WT due diligence and process-related items based on past Project experience, outlining what needs to be met for WT to certify completion.

A draft is produced and distributed for review and input by the contract parties, typically 12-18 months before the Project's completion. A draft meeting is then held to review any received comments, ensure party alignment of

expectations, deliverables and deliverable timing, and ultimately finalize and implement the draft.

Initially, all requirements are uncoloured and as the Project progresses and conditions are fulfilled, each line item is assigned a colour based on the 'traffic-light' system. The intent is to have a fully compliant (green) checklist at the time of WT's determination.

ITEM STATUS	
	Item not yet checked or verified
	Item agreed as deferred to post Substantial Completion
	Item deemed complete and criteria satisfied
	Item deemed to be a potential compliance risk or likely to be delayed
	Item deemed material compliance risk or delayed

The Project Completion Checklist is managed at a minimum, monthly, and requirement status updates are reviewed during the WT hosted **Project Closeout Meetings**. This distinct and non-contracted forum has proven to be beneficial in narrowing the parties' focus on all that is closeout, outside of the contracted committees. The Project Closeout Meetings follow the development of the draft and typically commence 6-12 months in advance of the Project completion.

Infrastructure Ontario has begun including a 'Substantial Completion Deliverables List' requirement on select P3 Projects as of 2022. The list can be considered a high-level and condensed version of our Project Completion Checklist, which not only supports the validity of the distinct process but also the need to continue challenging the status quo to implement better ways of doing things, in this case, managing the project closeout.

There will always remain room for improvement, however, WT has exhibited over time the capacity to develop and perfect a distinct quality service that has proven to be successful, as supported by our extensive portfolio, on-time certification track record, and a multitude of repeat clients.

3. OUR EXPERIENCE: Diverse, a multidimensional outlook.

WT has a combined portfolio of billions of dollars in major projects, programs and investment advisory led by a team of recognized and published subject matter experts. We have a diverse, **industry-leading portfolio** that includes P3 Advisory, offering

both Independent Certification and Lenders Technical Advisory services, Project Delivery with expertise in project monitoring, and a vast Cost Consulting service line, excelling in cost management and contract administration.

When you work with WT, you are working with the collective thinking of the profession's leading people. This pool of **global knowledge** is undeniable and an advantage to our clients as our multidimensional outlook cultivates excellence through experience, success from lessons learned and industry knowledge via partnerships. These advantages can directly tie to improving outcomes for project stakeholders as a team's diverse experience and skillset are properly utilized and leveraged in execution, increasing the probability of a successful delivery.

The P3 advisory service line, specifically Independent Certification, has a commendable portfolio of successfully certified projects across North America in the healthcare, justice, entertainment, rail/ transit, road and bridge/ tunnel sectors, including the first P3 healthcare project in Nova Scotia and Toronto's biggest subway tunnel, dug with a single tunnel boring machine.

In conclusion, adopting dissimilar execution methods, implementing distinct closeout management processes, and leveraging a team's diverse and unique skills can improve outcomes for project stakeholders and increase the probability of a successful delivery. WT will continue to lead by example and is proud to be DIFFERENT.

FOR MORE INFORMATION ON WT'S INDEPENDENT CERTIFIER SERVICES AND EXPERTISE, REACH OUT:

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P3 ADVISORY
PROJECT DELIVERY
PROJECT CONTROLS
REAL ESTATE ADVISORY
COST CONSULTING



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