



# KGC Consulting Services Ltd.

*Litigation Support • Legal Project Management • Commercial Management*

## Lorenzo Wallace, LSSMBB Consultant Professional Profile Overview



Lorenzo's career has been about embracing change, accepting roles of increasing complexity and responsibility while continuously developing and honing his industry skills. As a construction industry professional, he enjoys finding innovative solutions to increasingly complex challenges project owners face in today's environment. Additionally, as an advocate of continuous improvement processes and methodologies, he implements techniques and strategies to determine the root cause of construction problems.

### Knowledge, experience, and abilities include:

40 years of Canadian civil engineering, construction and business development experience which includes all provinces and territories, liaising with owners, architects, engineers, consultants, various levels of governments, First Nations Peoples, and private enterprise projects of varying degrees of complexity.

Value of projects; \$1 million to \$1 billion. Lorenzo's direct involvement has given him the opportunity to take more than three billion dollars of projects through concept, contracts, bid documents, bidding, construction, construction payments and completion phases of some ordinary as well as unique projects. His experience includes ALL aspects from development through to close out. Delivery methods include Design/Build, IPD, EPC, EPCM, P3, PM, CM and Design-Bid-Build to name a few.

Projects include Oil and Gas, Heavy civil, Highways, Roads, Bridges, Highway maintenance contracts, Land development, Mixed Use Commercial, Hospitality, Healthcare, Multi-Family Residential, Commercial and Residential High-rise, Prefabrication, Modularization, Infrastructure Asset Management, Industrial manufacturing, Steel Buildings, Public, Private Partnerships (3P)

His experience also includes supporting teams in the preparation of reports, estimates, schedules (CPM, Reverse Phase, and LPS – Last Planner System), tender documents, CCDC Contracts, CO, SI, RFQ, RFP, RFI, Planning, Permitting, Design Development/Construction Phases, Bid, and Bonding & Insurance.

Claim management is an unavoidable process in construction project management which requires effective management practices during the entire life cycle of a project. Lorenzo's approach to avoiding claims is by managing the root causes, contents of tender documents and contract documents are carefully analyzed. During the execution phase, establishing clear communication channels and collaboration between the parties is always a judicious approach because communicating the issues provides for an effective and mutually beneficial solution.

Past President ACI (American Concrete Institute), Past Director of ACI Ontario & Alberta Chapters, ACI Examiner, Past Chairman & Director, RMCAO (Ready Mixed Concrete Association of Ontario, Past Director of multiple Construction Associations

Credentials: B.Sc. Civil Engineering, UofC, Lean Six Sigma Master Black Belt (LSSMBB), LSSMBB Engineering, Lean Construction, Six Sigma, Prince2, Construction Management, Bluebeam, TCIC Construction Law, Managing Risk in Construction, Claims Management, Contract Management & Negotiation



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**Paul Winfield LL. B (Hons), BVC**  
**Senior Consultant**



## Professional Profile Overview

Expert Witness, Claims, ADR and Commercial Contracts specialist with over 30 years career in construction in a broad field of infrastructure industries including oil & gas, process plants, airports, rail, civil engineering and nuclear. Represented a variety of Owners and Contractors and assisted legal counsel in contract negotiations and a variety of ADR forums worldwide.

Successfully worked on a variety of projects and files with responsibility for the commercial management of major infrastructure projects with a value of in excess of \$1BN. Operating and managing at the executive level of a project structure in a PPP/PFI environment, representing companies in preliminary and delivery of live projects. Extensive experience on a variety of bespoke and standard form contracts including CCDC, FIDIC, New Engineering Contract (NEC), ICE and JCT Contracts.

Managed both contentious and non-contentious contractual matters and key concerns within organisations by providing legal and contractual insight and representation in contract negotiations in Europe, South America, Australia, the Middle East and the Far East; with major owners and contracting companies. Advised on contractual obligations in order to ensure legal compliance and to manage contractual risk. Responsibility for both the production and review of project claims, the development and implementation of strategies for risk and opportunity management, together with the evaluation and determination of contractor submitted claims to project and business management and counsel. Personally, responsible for contract drafting and administration, claims identification, evaluation, preparation and management, dispute resolution and litigation support.

Barrister at Law, Call July 2010. Certified ODACC Adjudicator, Member of The Honorable Society of the Inner Temple, The Chartered Institute of Arbitrators and Canadian Institute of Quantity Surveyors. Published written work, with contributions to 'Introduction to Construction Contract Management' Routledge. Training as a Mediator and Arbitrator and committed to personal and professional development.

## Expert Skills & Competencies

Expert skills set includes contract negotiation and drafting, contract review, negotiation and administration. Claims identification, preparation, review, presentation and advocacy. Forensic claims and schedule analysis, determination and evaluation. Administrative and project control management including scope development, change management and contract correspondence (prime and subcontract). Budget and financial management and control.



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## Core Expertise

- ◊ Contract Drafting
- ◊ Expert Reports
- ◊ Contract Negotiation (Terms & Conditions/Scope)
- ◊ Claims Identification, Preparation and Articulation
- ◊ Risk & Opportunity Management
- ◊ Forensic Analysis, & Determination
- ◊ Project Commercial Management
- ◊ Contract Administration
- ◊ Project Controls, Schedule/Programme Procurement

## IT & Other Skills

- ◊ Microsoft Office
- ◊ Primavera P6
- ◊ Estimating Software
- ◊ SAP Software

## Career Experience

- ◊ Commercial Director - Aecon, Toronto, Canada
- ◊ Senior Claims Manager - Hill International
- ◊ Managing Consultant - Kingsfield Consulting International
- ◊ Legal & Contracts Manager - CRC Evans & PIH Ltd.
- ◊ Freelance Consultant
- ◊ Associate Quantity Surveyor - Long O'Donnell,
- ◊ Commercial Manager - Capita Symonds
- ◊ Contracts Quantity Surveyor - AMEC
- ◊ Quantity Surveyor - Vinci

## Professional Designations/Affiliations

- ◊ Barrister at Law – Bar Vocational Course – Call July 2010
- ◊ Certified ODACC Adjudicator in Ontario
- ◊ Member of the Chartered Institute of Arbitrators (International Arbitration)
- ◊ Member of ADR Institute Ontario
- ◊ CEC – Canadian Institute of Quantity Surveyors



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**Jerry Crawford, PQS(F), PMP, GSC, MRICS**  
**Principal Director**



## Professional Profile Overview

Claims & Expert Report Professional/Commercial Management Expertise/Professional Quantity Surveyor/Project Manager with over 42 years of accumulated experience in the building and civil construction industry working predominantly in Canada on transportation, energy, commercial, industrial, multi-family residential, civil & building infrastructure projects during the procurement, pre-contract, execution, and post contract phases. Canadian and international experience working in USA, Bermuda and formally in South Africa. Has attended numerous court trials for insurance settlements, liens, and claim disputes.

Extensive experience working on claims & disputes with legal counsel, owners, contractors, subcontractors and surety companies. Expert report writing and input on issues regarding: Scope of Work Disputes, Constructability Analysis, Contract Compliance, Liens, Abandonment, Workmanship Defects, Delays & Disruptions. Extensive procurement background and project management site field experience encompassing design development oversight, schedule development & tracking and project controls.

Experience with pre-construction administration assistance, project execution commercial management services, project performance audits, and providing lessons learned follow up debriefings. Over 5 years of direct field experience as a coordinator, scheduler and project manager.

Past President of Prairie Chapter Region for the Canadian Institute of Quantity Surveyors (CIQS), a former CIQS National Board member. Board member of the ADR Institute of Alberta. Founder and Principal Director of KGC Consulting Services Ltd. since 2015.

## Expert Skill Competencies

Expert skills sets include: written & oral presentation public speaking, procurement strategy planning, contract reviews & negotiation, project feasibility analysis, scheduling reviews, budgeting, financing reviews, capital business planning input, design co-ordination reviews, constructability & performance audit reviews, contract administration, change order, drafting written notices, claims, contractual correspondence, risk assessments and scope development, scope management, dispute resolution and litigation support.

### Core Expertise

- ◇ Claims Preparation
- ◇ Expert Reports
- ◇ Capital Budgeting
- ◇ Entitlement Quantification
- ◇ Assessment Reports
- ◇ Contractual Correspondence
- ◇ Contract Administration
- ◇ Final Account Close Out

### IT & Other Skills

- ◇ Microsoft Suite
- ◇ Estimating and Scheduling software
- ◇ Project Management Software
- ◇ Public Speaking

### Project Experience

- ◇ Public Housing Delay Claim - (Alberta)
- ◇ Philip J. Currie Dinosaur Museum - (Alberta)
- ◇ Chain Lakes Reservoir Flood Weir - (Alberta)
- ◇ Elbow River Pedestrian Bridge - (Calgary)
- ◇ Lafarge Exshaw Cement Plant - (Alberta)
- ◇ New Calgary Public Library - (Calgary)
- ◇ Energy Dispute - (Alberta)

### Professional Designations/Affiliations

- ◇ Fellow Professional Quantity Surveyor (PQS)(F)
- ◇ Project Management Professional (PMP)
- ◇ Royal Institute of Chartered Surveyors (MRICS)
- ◇ ADRIA (Full Member)
- ◇ Gold Seal Certified (GSC)
- ◇ Society of Construction Law North America