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In the hustle and bustle of activity, necessary for preparation of the annual WSA/AIA Convention, this issue of the Wisconsin Architect/Punch List will be a shortened version. It is being prepared prior to convention but will reach you following convention. Our May issue will be a post-convention issue and will highlight the many activities of the 1976 convention . . . AJC

The process of design and construction of major projects is going to be managed; the only question is “who will do the managing?” The architect, or the architect/engineer is a logical candidate for the role of the Construction Manager because of his understanding of how to provide professional services for a fee. Construction Management calls for the same client/professional relationship, uncompromised by divided self-interests.

A serious misunderstanding of what Construction Management is, and what a Construction Manager does, had led a large number of unqualified people — professional, technical, and managerial — to self-appoint themselves as practitioners of an art they have not mastered. And unless the Construction Manager is prepared to learn or assemble a number of skills not normally within any one profession’s competence, he is not going to be able to act as a Construction Manager for a sophisticated client. The function of Construction Management goes far beyond changing a letterhead to include those two words.

What has brought about this surge of interest in Construction Management? Essentially, it arose because the building client has become dissatisfied with the ability of architects and the allied construction industry to provide a quality facility, and at the same time, to control the time it takes to design and construct it, as well as the total cost of the facility. In a time of rapidly escalating costs of both labor and materials, the client feels that the most effective weapon he has against building cost inflation is better management of the processes. Most architects, engineers, and contractors will admit that design and construction have not been managed nearly as efficiently as most business and manufacturing operations.

The logic by which the best modern management operates is that you must Plan, Organize, Implement, and then Control the process of whatever you mean to accomplish. In this case, to design and construct a physical facility.

While it seems obvious that the Construction Manager is expected to control both construction cost and the time required for designing and building the project, most owners are adding another criteria: the ability to understand and manage financial planning and cash flow requirements.
The architect cannot count completely on a demonstrated record of successfully managing the design process, although obviously, that is a first requirement. Even if his firm has mastered perfectly the management of his traditional phase of the project, it is only a part of a greater whole. The Construction Manager must be as familiar with all of the construction processes as a true general contractor; he must be as skilled in the area of cost control as a talented comptroller; as knowledgeable of scheduling control as a plant manager; and as financially savvy as an investment banker.
Now there is no intention to suggest that all of these talents must be centered in some Superman, some Renaissance man to end all Renaissance men. But what we have learned at SH&G through a series of successful Construction Management projects (and one spectacularly unsuccessful one) is that all of these skills must be represented on the Construction Manager’s staff, immediately available to him.

As a result of our firm’s experience, we believe that the following talents must be available within any firm offering Construction Management services:

1) **Design process experts.** They are completely familiar with the managers of the design process in all of the significant disciplines (planning, architectural, mechanical, structural, electrical and civil).

2) **Business managers.** These must not only be trained in, but experienced in, managing a business or process. But to fully understand the design and construction process, they must have a background in the estimating, negotiating and supervision of field projects, as well as a working knowledge of the design process either as an architect or as one of the engineering disciplines.

3) **Cost controllers.** In addition to knowing how to estimate the costs of the various systems in a building, these people must also understand the cost implications of all decisions made by the design disciplines. Value engineering, life-cycle costing, and owners’ cost implications are part of this repertoire. As decisions are made and the design progresses, these cost controllers must be able to quickly and accurately estimate the cost of various design alternatives.

4) **Schedule controllers.** This skill involves an understanding of contractors’ time requirements in all of the trades, as well as the time needed by the designers, whose work is interdependent on one another (for example, the structural engineer must know the weight of the rooftop mechanical equipment before he can size his structure). Also, these people must be aware of the implications of all special knowledge they have of the construction labor and/or materials conditions in the project area. If one kind of specialized labor, like steamfitters, is in short supply in the project area, this information must be programmed into the decisions of the mechanical engineer on the selection of the HVAC system. And if the structural designer is choosing between concrete and steel, both the cost and the availability of these materials in the job area must be available to him.

5) **Financial expertise.** The Construction Manager must have on hand people who understand what the cash flow requirements of various projects will have on the owners. While the embarrassment of not having cash ready for payment of work put in place is obvious, it is equally important that large amounts of money not be borrowed, nor bonds issued, too long in advance of when the funds are needed. It could mean extra interest paid, or borrowing at a disadvantageous time. This need to know how much and when money will be needed is equally important to the industrial or business client, a hospital board, or a school board, and poor advice can be costly. Any such extra cost of a facility adds nothing to its quality or its function. The Construction Manager must know the financial relationships of design decisions and the market for the project space. For example, a known rent structure will set certain size and cost parameters that can be exceeded only risking the project’s financial soundness. This is especially true in rental apartments and speculative office space.
The very breadth of the services required in Construction Management indicate that they will almost never be found in a single individual, and that a team of experts will have to be assembled. Since these should be top men in their fields, it means that they will be expensive, and it appears that only the larger organizations will be able to offer all these services under one roof, and will be able to secure the volume of projects that will make these services economically viable. However, it is perfectly possible for the smaller firm to assemble as a joint venture the kind of expertise demanded.

The general contractor, who may have top-quality civil, architectural and structural construction people, has a different problem in that he will have to add the mechanical and electrical construction people, plus the architectural and engineering design management and the financial expertise. Another entry is the management expert, who also owns but one leg of the stool, and will have to find both design and construction management people.

While Construction Management is important on the traditional lineal scheduling process of Program, Design, Bid, and Construct, it is absolutely vital to the success of any accelerated and overlapped process, such as Phased Construction, Fast-Track, or UTAP, or whatever. Under such systems, design decisions can be implemented as they are made without having to wait until the entire design process is completed and documents prepared for bidding.

But this can be successful only if the Construction Manager has given the designers all of the information they need to make those original decisions. For example, on one extremely successful project, SH&G was able to pour footings and order structural steel almost immediately because the client had accepted the criteria that the bay size would be 40' x 50', the buildings would be one-story and truss-roofed, and the HVAC would be roof-mounted. Obviously, this ruled out any later change to a high-rise structure, except at a predictable cost in time and money. While the designer might think of this as a constriction on his options, the design process always consists of a series of decisions building on the ones that went before. The traditional system makes the same irrevocable (because of cost) decisions, but they are not acted upon until the last one is made.

It will be the Construction Manager's ability to lay out a realistic construction schedule that will permit him to identify the proper sequence and detailing of all the design and construction operations in order to make the most effective use of the time, money, and people resources at his command. Decisions on quality criteria remain the province of the owner and his architect, but the Construction Manager is responsible for recommendations on the time duration of design and construction, and the cost of construction. Unless it conflicts with an owner/architect aesthetic or quality standard, he will also be able to utilize performance criteria in the specifications.

During the implementation of these people, time and money resources, the Construction Manager must constantly monitor and forecast the progress, with special emphasis on the identification of variances and/or problems that threaten the Owner's objectives. He must take prompt and effective action to control those problems.

In an early stage of one of SH&G's projects, the Construction Manager visited a supplier's factory, and became convinced that there was no way that the deadline for some critical electrical equipment could be
met, and that this failure would set back the project several months. Since on-time delivery was the owner’s prime objective, another manufacturer was located who could meet the delivery date, and the contract was transferred to him. On a traditional project, no action would have been taken until the manufacturer actually failed to deliver, and then the contractor would attempt to find a substitute. In this case, the early recognition of the problem and the prompt action eliminated any delay in the project.

Although the construction schedule gives subcontractors specific dates for the beginning and the end of their work, one or another trade often falls behind, threatening the schedule of every trade that follows. In this case, the experienced construction manager will insist that the sub go on overtime, or add more workmen, to make up the time and progress he has lost. As an aside, we have learned that prompt payment of sub-contractors for work put in place insures that men will not be pulled off your job because some other job is more reliable in payment. Many of these contractors operate on a close margin, and quick inspection, certification, and payment, will give your job a high priority with these small businessmen.

The process of Construction Management is one of orchestrated teamwork, with the Construction Manager as the conductor (but not dictator) of the activities of Owner, Architect/Engineer, and Contractors. One of the surest ways for a project to fail to meet its objectives is to allow the owner to avoid or postpone the decisions he must make, at the time he must make them. As the owner, he has the right not to make them, but the Construction Manager must make crystal clear the cost in time and money of such a delay, so that the owner’s decision (or non-decision) is an informed one.

How do you assure this kind of decisiveness? One successful tactic is that of regularly scheduled meetings, with a pre-published agenda of all problems that require decisions, and the stipulation that every item on the agenda MUST be resolved before the meeting is adjourned. Under such a stricture, it is amazing how many tough decisions get made quickly!

While many architects and architectural firms will not be interested in providing this CM service, and will prefer playing the traditional role of design architect, working closely with the other design disciplines, one fact has to be faced: projects are going to be managed by somebody.

This does not imply any diminution of the role or responsibility of the design professional. In fact, there are some important advantages to be gained. The designer will get a crash course in how to manage his own design process that should make him more efficient and more profitable. He should be able to eliminate the false starts and re-starts in design that come from getting facts too late to prevent errors or false premises. And he will get an education in how the other parts of the process function that should improve his own skills as well.

To summarize, any professional or firm interested in doing Construction Management must broaden the skills available to include all those we have named. The architectural firm with a sound background of managing all of the other design disciplines starts with the same excellent potential as the A/E.

Construction projects are going to be managed, and this responsibility is going to be given to those who know how to manage the processes from beginning to end. Some of these managers will be architects or
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JACOBY ELECTED TO FAIA

John P. Jacoby, Southeast Chapter, has been elected to the College of Fellows of the American Institute of Architects. This is a lifetime honor bestowed for outstanding contributions to the profession. Jacoby is one of seventy-one in the nation to be so honored this year by the twenty-six thousand members of the American Institute of Architects.

Formal investiture of the new Fellows will take place on May 3, 1976 at the National AIA Convention in Philadelphia. AIA Fellows may use the initials "FAIA" following their names, to symbolize the esteem in which they are held by the profession. Apart from the Gold Medal, which may be presented each year to one architect from any part of the world, fellowship is the highest honor the Institute can bestow on its members.

Jacoby has combined his architectural career with thirty-five years of service, leadership and involvement in his professional society having served not only on National committees but as president of the Southeast Wisconsin Chapter and as president of the Wisconsin Society of Architects. He is currently serving on the Executive Committee as a director of the Wisconsin Society of Architects.

Jacoby is President of the Milwaukee architectural firm of Herbst, Jacoby & Jacoby Inc. Recent work of the firm includes the UWM Physics Engineering Building, The Fine Arts Buildings for the University of Wisconsin — Oshkosh, The Communication Arts Building for the University of Wisconsin — Parkside, The Menomonee Falls Municipal Building and Library, plus school buildings for St. Mary, St. Anthony, and Good Shepard parishes in Menomonee Falls. The Herbst, Jacoby & Jacoby firm also designed the University of Wisconsin Primate Research Center in Madison and the Primate holding Facility, Vilas Park, Madison. Under construction is the ESS and Computer Center for the Wisconsin Telephone Company in Oak Creek, Wisconsin.

Jacoby joined a group of fifteen men and women architects in the state of Wisconsin who have been so honored over the years.

The WSA Executive Committee, at its March meeting, voted to support two resolutions, one from the Arizona Society of Architects and the other from the Iowa Chapter of the AIA. The Arizona resolution would strengthen the state component as a distributor for all AIA documents by not having the Institute Publications Department compete with the local state society. The resolution states "The American Institute of Architects shall hence forth make direct sales to members only at regular list prices, less a cash discount not to exceed five percent (5%) of the gross sale price of all documents and publications of the Institute." . . . The Iowa Chapter resolution encouraged the increase in membership of the AIA nation wide, since there are approximately 60,000 registered architects in the United States, as compared with 28,000 Corporate members of the AIA. The Iowa resolution reads "be it resolved that a national goal to increase our membership to include at least a majority of the registered architects in the United States to be established; and that a task force be directed to determine the necessary steps to attain this goal and report its findings to the Board of Directors prior to Grassroots 1977." Our Executive Committee recommended to the Iowa Chapter that an addition to their resolution include "the report of the above mentioned task force become an item of
business at the 1977 AIA Convention." ... The appointment of Leonard Reinke, AIA as 1977 WSA/AIA Convention Chairman was announced ... John Simonitsch has been appointed Chairman of an Office Relocation Task Force. The present lease for WSA offices is up in November, 1976 and a decision must be made to find new quarters, or stay in the same building . . . other committee assignments made: Bob Peterson, AIA, Northeast Chapter appointed to WSA Housing Committee Chairmanship; Ken Kurtz, AIA, Southeast Chapter appointed to WSA Public Relations Committee Chairmanship.

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Petitions for nomination for George A.D. Schuett, AIA, for nomination to Vice President of the American Institute of Architects were circulated. George has been asked to run for Vice President by architects in the North Central Region and other parts of the country. Schuett has served for three years as Regional Director, representing Wisconsin, Minnesota, North Dakota and South Dakota. As Regional Director he serves on the Institute Board of Directors, and in that capacity has served well as Chairman of the Restructuring of the Institute Task Force, Commissioner to Component Affairs and other Institute committees. Voting for Vice President will take place at the Annual Convention, May 2-6 in Philadelphia. We wish George much success as he represents Wisconsin and the North Central Region. There will be five nominees and three Vice Presidents will be elected.

A Professional Liability and Loss Prevention Seminar for Architects and Engineers will be held Friday, May 14, 1976 at the Ramada Inn-Airport, Milwaukee. This seminar is co-sponsored by Wisconsin Society of Professional Engineers, Wisconsin Society of Architects/AIA, Professional Engineers in Private Practice, American Institute of Architects, and the Victor O. Schinnerer and Co., Inc. Speakers include Paul L. Genecki, Director of the Office for Professional Liability Research, Victor O. Schinnerer & Co., Consulting Attorney Arthur T. Kornblut (former AIA staff) and Gerald W. Farquhar. Also speaking will be Jack McKee, Staff Director for PEPP. The one day session will include “Legal Influences on Professional Practice”, “Protecting Against Liability Claims”, “The Relationship of Contract Documents and Technical Services to Professional Liability” plus a workshop on Professional Service Contracts and How to Respond to a Professional Liability Claim. Registration fee is $50.00 for first attendee from a firm and $35.00 for each additional attendee (includes lunch, refreshments and seminar hand-out materials). Registrations may be sent to Mr. Jack McKee, Staff Director — PEPP, National Society of Professional Engineers, 2029 K Street, N.W., Washington, DC 20006.

The Wisconsin entrants to the National Energy Conscious Design Competition will be on public display at the University of Wisconsin-Milwaukee School of Architecture and Urban Planning May 10th and 11th. The competition is sponsored by the AIA Research Corporation and supported by the Federal Energy Administration. Awards will include national recognition through publication in a book which will be distributed to all student finalists, participating architectural schools and to practicing architects throughout the United States. Further information regarding the competition may be obtained by writing:
Peter Smeallie
AIA Research Corporation
1735 New York Ave., N.W.
Washington, DC 20006

During Historic Preservation Week a forum on Milwaukee Neighborhood Conservation, sponsored by Historic Walker's Point, Inc. will be held Tuesday, May 11, 1976, 9:00 a.m. to 4:00 p.m. at the Northwestern Mutual Life Insurance Co., 720 E. Wisconsin Ave. The conference is for those concerned with the conservation of Milwaukee's built environment and will offer an opportunity to discuss and share concerns, search for solutions, and plan for ongoing cooperative effort of people seeking to effect change. The program includes a morning of individual presentations by participating organizations plus bus and walking tours, a box lunch and an afternoon of workshops on problem areas. For further information contact Historic Walker's Point, Inc., 414 W. National Ave., Milwaukee, WI 53204.
A two day symposium on Architecture and the Arts will be sponsored by the University of Wisconsin-Parkside, in Kenosha. Participants as speakers and panel discussion resources are James R. Henrekin, AIA, Principal Architect/H.O.K., St. Louis, MO.; Philip H. Lewis, Landscape Architect, U.W.-Madison; Thomas H. Logan, City and Regional Planner, UW-Madison; Richard Miles, Sculptor, Denver, Colorado; Bruce L. Renquist, Industrial Designer, Racine, WI; Victor A. Sorell, Art Historian, Chicago State University. Francis O. Murray, Assistant Director, UW-Parkside Campus Planning/Architect will be moderator for the programs. Subject material will cover the philosophy of Art in Architecture and the role of art, aesthetics and design in assuring quality land use in the environment. For further information contact Professor Rollin Jansky, Department of Art, University of Wisconsin-Parkside, Kenosha, WI 53140.

IN MEMORIUM

Perc Brandt, AIA
Emil Klingler, AIA
Roger Kirchoff (former Wisconsin State Architect)

MEMBERSHIP ACTIONS

The following membership actions were taken by the WSA/AIA Executive Committee at their March 11, 1976 meeting:

NEW MEMBERS:
PATRICK T. CONNERS — Student Associate, Southeast Chapter;
HAROLD L. OLSEN, Professional Affiliate, Southwest Chapter;
JOHN T. SAUNDERS, Associate, Southwest Chapter;

MEMBERSHIP ADVANCEMENTS:
FRED D. ANDERSON, advanced to Professional Associate, Northwest Chapter;
DONALD H. Knodel, AIA transferred from the Northern Illinois Chapter to the Northwest Wisconsin Chapter as a Corporate member;
ALLEN J. Strang, FAIA, advanced to Emeritus, Southwest Chapter;

MEMBERSHIP RESIGNATIONS:
DONALD E. IVERSON, Corporate Member, Southwest Chapter;
GEORGE F. MOMMAERTS, Associate Member, Northwest Chapter.

1976 WSA/AIA ACTIVITIES FOR APRIL, MAY AND JUNE

<table>
<thead>
<tr>
<th>DATE/TIME</th>
<th>EVENT</th>
<th>LOCATION</th>
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<tbody>
<tr>
<td>April 29</td>
<td>WSA Southeast Wisconsin Chapter Meeting</td>
<td>Turners Club Milwaukee</td>
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<tr>
<td>May 2-6</td>
<td>National AIA Convention Symposium; Architecture and the Arts</td>
<td>Milwaukee</td>
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<tr>
<td>May 4-5</td>
<td>UW Extension: Air Conditioning Design Controls</td>
<td>UW Parkside Kenosha</td>
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<tr>
<td>May 10-14</td>
<td>Milwaukee Neighborhood Conservation Forum Historic Walker's Point, Inc.</td>
<td>UW Milwaukee Northern Life Bldg. Milwaukee</td>
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<td>May 11</td>
<td>WSA/AIA Executive Committee Meeting</td>
<td>UW Madison</td>
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<td>May 13</td>
<td>UW Extension: Planning &amp; Zoning for Organized Community Growth Professional Liability — Loss Prevention Seminar</td>
<td>Ramada Inn Airport Milwaukee</td>
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<tr>
<td>May 13-14</td>
<td>UW Extension: Structural Design Loads UW Extension: Steel Design</td>
<td>UW Madison</td>
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<td>May 14</td>
<td>WSA Exhibitor Golf Outing</td>
<td>Lac La Belle Country Club Oconomowoc</td>
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<tr>
<td>May 19-20</td>
<td>WSA/AIA Executive Committee Meeting</td>
<td>Lake Lawn Lodge Delavan</td>
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<td>May 24-28</td>
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<td>May 25</td>
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<td>June 10</td>
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