COAA Owner Training Institute®

TRAINING FOR OWNERS, BY OWNERS

Course Catalog

To maximize the learning experience, attendance is normally capped at 25 and courses are led by COAA's signature three-person team of instructors — an Owner, designer, and builder — allowing participants to gain a greater understanding of each party's perspective.

COAA®

FOR OWNERS
BY OWNERS

COAA Owner Training Institute®

Training for Owners' project managers - from the Owner's perspective - provided through courses developed and presented by a team of industry experts

WHO SHOULD ATTEND COAA'S OTI COURSES?

OTI courses are geared toward Owners' project management staff and leadership, but some courses may also be valuable for other members of an Owner's organization, such as operations & maintenance staff, procurement officials, and even the end user or internal client for a specific project.

Other stakeholders, such as design professionals and builders, will enjoy gaining a better understanding of the Owner's perspective.

The course content is designed with an early-to-intermediate experience level, but even the most experienced professionals will benefit from and find value in "sharpening the saw."

> *"We're about to host our 4th OTI class in less than a year. We've sampled other training platforms, but only the COAA OTI classes offer such rich and diverse perspectives on each topic by having an Owner, builder, and design professional (or attorney) present each course.*
>
> —JIMMY PATEL
> JOHNS HOPKINS UNIVERSITY
> APPLIED PHYSICS LAB

New Project Managers

Owners' project managers often migrate from consulting roles and are new to serving as the Owner's representative. This training provides the opportunity to view and understand their role from all perspectives – the Owner's, designer's, and builder's. They will not only see & hear about some of the challenges they are likely to experience, but learn from people who have encountered and addressed these challenges.

Owner's Staff with Limited Years of Experience

Course content is developed around people who are not new to the industry and are familiar with industry vocabulary, reading plans, and processing pay request applications. These participants know enough to keep up with the conversations and appreciate the knowledge and lessons shared by both the instructors and experienced participants in the class.

Experienced Project Managers and Senior Management

OTI courses provide the opportunity for more senior managers to sharpen their skills, refresh their knowledge, and learn about other proven strategies & tools from experienced Owner, designer, and builder instructors. For those who are truly lifelong learners, COAA's OTI courses provide the unique opportunity to expand one's knowledge base and gain ideas for continuous process improvement.

Training For Owners, By Owners

We Can Bring Owner Training Courses to You!

IN-HOUSE TRAINING

If you procure or manage design and construction services for your organization — regardless of sector or project type/size — COAA can help improve your project delivery processes with content presented on your "home turf."

Our experienced instructors (Owner, design professional, and builder) come to you

• Reduce time out of the office for your staff

• Save money by eliminating travel and lodging costs

• Train your entire project team so that everyone is on the same page – including the end user

• Take advantage of the discounted pricing for training

• Hold courses at a time convenient for you

What do you need to do?

1. Decide which course or courses you would like to host at your location and the preferred timeframe.

2. Secure a meeting room with flexible seating for 25 (1,200 sq ft), a front instructors table, A/V assets, and controllable natural light if possible.

3. Complete and submit the In-House Training Request Form or contact COAA staff at coaa@coaa.org.

OTI ADVISORY GROUP

This committee provides oversight of and guidance for the Owner Training Institute in terms of content, delivery, and instructors.

Terry Cook
University of Maryland, Baltimore County
EMERITUS

Kate Edwards
The Whiting-Turner Contracting Co.

Eric Feiss
GWWO Architects

Kirsten Neff
General Services Administration
EMERITUS

Rob Voss
Ballinger

Warren Williams
Lord Aeck Sargent

Leisa Williams-Swedberg
Michigan State University

Training For Owners, By Owners

Course Delivery & Fees

COMING SOON!

BIM 101 for Owners
A short virtual course that seeks to arm Owners with enough baseline information to begin or improve their Building Information Modeling journey.

FOR THE INDIVIDUAL

COAA OTI courses are held around the country in convenient locations. Courses are often held in conjunction with national conferences or chapter meetings/workshops.

	Member	Non Member
One Day Course	$550	$750
One and One-half Day Course	$750	$950
Two Day Course	$850	$1,050
2-Hour Virtual Course	$200	$300
4-Hour Virtual Course	$400	$500

FOR THE TEAM (UP TO 25 TEAM MEMBERS)*

Save time and money by eliminating travel and lodging costs for your team's training. We can bring COAA OTI courses to you! Train your entire project team — even the end users — with COAA's In-House Training!

	Member	Non Member
One Day Course	$11,500	$13,500
One and One-half Day Course	$13,500	$15,500
Two Day Course	$15,500	$18,500

*Human Skills course is $25/person more and $500 more for lump sum rate to cover CliftonStrengths assessment.

"Really enjoyed the training last week in Nashville. Getting this before we jump off the deep end with CMAR was really enlightening for us … seems like COAA is a great resource for construction Owners."

-RANDALL J. LUEDERS, CITY OF CEDAR PARK (TX)

WHY OTI?

The COAA Owner Training Institute® provides experience-based training that does not exist in the industry. The courses are highly interactive, with small group exercises, role playing, and large group discussions. This keeps participants engaged, allows for peer-to-peer learning, and provides real-life examples of challenges Owners are likely to encounter. The materials presented are valuable and comprehensive, but further complemented with "take-home" examples, templates, articles, reports, and other resources that allow the learning to continue long after the class is completed.

Training For Owners, By Owners

COAA OTI In-house Training Request Form

Select the course(s) you would like COAA to bring to your organization.

Core Skills

Cost Management (1 DAY)
Introduction to Construction Project Management (2 DAYS)
Schedule Management (1 DAY)
Project Management:
An Owner's Perspective (1.5 DAYS)
Lean for Owners (1 DAY)
Human Skills (1 DAY)

Process Management

Design Process Management (1 DAY)
Project Closeout (1 DAY)

Project Delivery

Construction Management At-Risk (2 DAYS)
Design-Bid-Build: How to Make It Work Well (1 DAY)
Design-Build (2 DAYS)

Project Team Selection

Construction Team Selection (1 DAY)
Design Team Selection (1 DAY)

ORGANIZATION

CONTACT   PHONE

TITLE   EMAIL

ADDRESS

CITY   STATE   ZIP

Provide (3) Date Options
minimum 3-month lead time required

FIRST OPTION

SECOND OPTION

THIRD OPTION

Number of Participants:

(MINIMUM 15, MAXIMUM 25)

Submit Completed Form

Email completed form to **coaa@coaa.org** with the subject line In-House Training. A COAA representative will contact you to develop an implementation plan. For more information, call COAA Headquarters at (770) 433-0820 or use **THIS** inquiry form.

Construction Owners Association of America ⎪ Owner Training Institute®
5000 Austell Powder Springs Road, Suite 151 ⎪ Austell, Georgia 30106
(770) 433-0820 ⎪ coaa@coaa.org

Training For Owners, By Owners

OTI Courses
Core Skills

Cost Management
Duration: One Day

Learn both best practices in the development of the project budget and strategies for maintaining the budget. Discover methods for designing to the budget, defining and managing contingencies, value management, use of allowances and alternates, change order management, and the financial close out of the project.

Introduction to Construction Project Management
Duration: Two Days

Gain a broad understanding (or improve your knowledge) of all areas of an Owner's management of a project.

Learn about all of the elements in the design and construction of a project and tips and tools to achieve project success. Specific tools, strategies, and topics are shared and discussed, for every stage of a project ... from delivery methods and consultant selection, programming, and stakeholder engagement to managing costs, leading the design phase, construction administration, and project closeout.

Schedule Management
Duration: One Day

Learn best practices for the development of an Owner's project schedule including the "dos and don'ts" and strategies to manage the schedule during both the design and construction phases.

Topics include how to properly review the schedule and schedule updates, proactive strategies to maintain the schedule, how to identify the warning signs if things are going off track, methods to manage float, and approaches to deal with various types of delays and make up time.

Project Management: An Owner's Perspective
Duration: One and One-Half Days

Learn how to lead and motivate a project team to achieve project success. Tools, strategies, and options will be shared, including:

- An in-depth discussion of the Owner Project Manager's role and how it differs from the PM role in design and construction firms
- Proven methods to manage budget, scope, schedule, and quality
- Strategies to engage stakeholders including O&M colleagues to manage their expectations
- Tools to assess, minimize, and manage the owner's risk
- Measures to avoid or moderate disputes

Training For Owners, By Owners

OTI Courses
Core Skills (continued)

Lean For Owners
Duration: One Day

Most facility/project Owners have a basic understanding of what Lean means, but may not know enough to truly "speak the language," understand which Lean strategies are best suited to a particular project or process improvement effort, and lead the team. Two of the industry's leading organizations - COAA and LCI, the experts when it comes to Owners and Lean - have partnered to fill that knowledge void.

This 1-day course will provide a broad overview of Lean tenets and fundamentals and equip attendees with the ability to implement at least three Lean techniques on their projects or within their organization. As with other COAA Owner Training Institute® courses, learners will be led by a 3-person instructor team comprised of an Owner, design professional, and builder to ensure all perspectives are included.

Human Skills
Duration: One Day

Ever been on a project team where people just clicked, leading to a better project and/or an improved experience? What was it about that group of people that made it memorable? The answers likely have something to do with culture, trust, and leadership by all. The "Human Skills" course was created to help Owners and their partners better understand themselves; explore trust and how it's granted or withheld; learn, discuss, and practice ways to create & maintain a healthy team culture; and ultimately enjoy better results AND a better experience.

All members of an Owner's staff or a particular project team will benefit from this 1-day workshop developed specifically for AEC industry stakeholders by organizations - COAA and Ripple Intent - with a passion for people, Owners, and continuous improvement of the project delivery experience.

"This course felt like more of a back and forth rather than 8 hours of lecture time - which was excellent! I learned a lot from the instructors who had an enormous amount of collective knowledge and experience.

Each instructor contributed to a rich conversation about each topic.

– LISA LANIER, UNCC

Training For Owners, By Owners

OTI Courses
Process Management

Design Process Management
Duration: One Day

Discover why Owners must manage the design process and discover proven techniques for doing so.
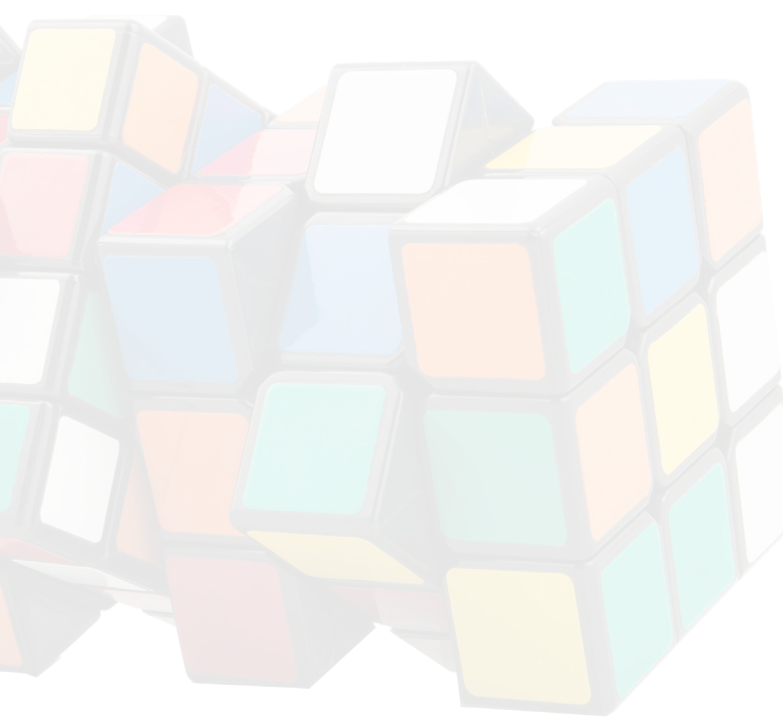
Learn how to keep the design on schedule and achieve a project that you can construct within your budget, while mastering the delicate process of satisfying your stakeholders. See the design process from the designer's perspective, understand what the design team needs from the Owner, and hear strategies for how to lead your project team through a successful design.

Project Closeout
Duration: One Day

Learn how planning, teamwork, and effective management are keys to successful closeout. Specific, proven tools and strategies will be shared, including:

- Why one starts the close out process at the beginning of the project
- How and when building commissioning should really start
- Differences in project closeout based on project size (under $100K, under $1M, and over $1M)
- Tools to streamline closeout including prompt punch list completion, complete O&M manuals, and efficient financial closeout
- How to deal with elements of closeout associated with non-construction vendors (i.e. furniture, moving, telecom, etc.)

"We came back into the offices yesterday and raved about how informative the class was ... we would like to have your team come to Toronto and present to our executive team."

– DONOVAN MILLER,
GREATER TORONTO AIRPORTS
AUTHORITY

Training For Owners, By Owners

OTI Courses
Project Delivery

Construction Management At-Risk
Duration: Two Days

Learn what to expect from Construction Management At-Risk (CMAR) and how to leverage this method for maximum value.

Learn best practices in the implementation of CMAR such as: the art of the guaranteed maximum price (GMP), value engineering the right way, establishing and managing the use of contingencies, and many other valuable lessons learned. Participants will attain a comprehensive understanding of the CMAR delivery method and its mechanics.

Design-Build
Duration: Two Days

Learn how to prepare, lead, and motivate a project team using the design-build delivery method. Specific tools, strategies, and options are shared including:

- The differences in managing the types of Design-Build (Closed Book vs. Open Book) and the aspects of each
- Best practices for establishing the appropriate level of design criteria/project program and tools to achieve your goals
- Strategies to maintain control of the design in Design-Build
- Approaches to quality assurance using the Design-Build method
- Tips for the management of a Design-Build project

Design-Bid-Build: How to Make It Work Well
Duration: One Day

Discover how to make Design-Bid-Build work for you! This course provides best practices on how to do Design-Bid-Build well! Discussions include methods to enhance cost information during the design phase, maximize the completeness of the bid documents, and approaches on how to avoid a "bid bust."

Experience what it is like to be in a general contractor's office on bid day; learn how to overcome what can often be an adversarial relationship and how best to ensure quality control.

TEN REASONS
Owner PMs Should Attend OTI Courses

Click Here to Learn More

OTI Courses
Project Team Selection

Construction Team Selection
Duration: One Day

Another most important decision an Owner makes for a successful project is the selection of the construction team!

Gain a broad understanding of the methods available and the selection process from the solicitation to scoring and interviews to award. Learn the best practices in creating a process that is fair and transparent.

Discover tips on evaluation criteria, interviewing firms, conducting reference checks, considering cost in the selection, and debriefings.

Design Team Selection
Duration: One Day

One of the most important decisions an Owner makes for a successful project is the selection of the design team!

Gain a full understanding of the selection process from the RFP and scoring methods to interviewing and award. Learn the best practices in creating a fair and transparent process.

Discover tips on developing project-specific evaluation criteria, interviewing firms, conducting reference checks, negotiating fees, and conducting debriefings.

VIRTUAL OFFERINGS

Certain OTI courses are available in virtual form - contact COAA staff for information.

Also, a new virtual "BIM For Owners" course is under development, and COAA offers webinars and other virtual content throughout the year.

Visit COAA's Events page to register.

COAA Owner Training Institute

Kellie Fletcher
Georgia State Financing and Investment Commission

Check out our video here!

"I can't tell you how valuable it is to learn and interact with people who have been there and understand ... really well done and gave me plenty of ideas that I brought back to Missouri. I also felt good about the emphasis on collaboration and the underlying message of fairness."

- JOHN NEAL,
UNIVERSITY OF MISSOURI SYSTEM

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