

# 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

*"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



## COAA Owner Training Institute®

**Training for Owners' project managers - from the Owner's perspective - provided through 13 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."

#### **"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 — whether you are with a university, K-12 school system, healthcare facility, lodging, government, transportation, utilities, or manufacturer — COAA has designed a program that can bring any of our Owner Training Institute® courses to your location.

### 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  
(RETIRED)*

**Kate Edwards**

*The Whiting-Turner Contracting Co.*

**Eric Feiss**

*GWWO Architects*

**Mike Kenig**

*Holder Construction (RETIRED)*

**Kirsten Neff**

*General Services Administration*

**Rachel Prinkey**

*Penn State University*

**Rob Voss**

*Ballinger*

**Warren Williams**

*Lord Aeck Sargent*

**Leisa Williams-Swedberg**

*Michigan State University*

### 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 that can accommodate seating for 25 (1,200 sq ft), a front instructors table, and A/V assets.
3. Complete and submit the In-House Training Request Form.



# Course Delivery & Fees

## NEW COURSES COMING IN 2023!

### Human Skills for Owners

An in-person dive into leadership, team-building, communication, and other skills not covered in school.

### 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
<b>One Day Course</b>	\$495	\$695
<b>One and One-half Day Course</b>	\$695	\$895
<b>Two Day Course</b>	\$795	\$995
<b>2-Hour Virtual Course</b>	\$195	\$295
<b>4-Hour Virtual Course</b>	\$295	\$495

## 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
<b>One Day Course</b>	\$10,900	\$12,375
<b>One and One-half Day Course</b>	\$12,900	\$14,875
<b>Two Day Course</b>	\$14,900	\$17,375

## 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.

*"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)

**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)

## Process Management

Construction Process  
Management (1 DAY)  
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)

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ORGANIZATION

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CONTACT

PHONE

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TITLE

EMAIL

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ADDRESS

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CITY

STATE

ZIP

**Provide (3) Date Options**

*minimum 3-month lead time required*

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FIRST OPTION

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SECOND OPTION

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THIRD OPTION

**Number of Participants:**

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(MINIMUM 15, MAXIMUM 25)

**Submit Completed Form**

Email completed form to [coaa@coaa.org](mailto: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 (800) 994-2622 or use **THIS** inquiry form.

**Construction Owners Association of America | Owner Training Institute®**  
5000 Austell Powder Springs Road, Suite 206 | Austell, Georgia 30106  
(800) 994-2622 | [coaa@coaa.org](mailto: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

### 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.

# OTI Courses

## Process Management

### Construction Process Management

**Duration: One Day**

Learn proven tools and strategies to manage and lead your team successfully through construction.

Discover successful leadership skills during the construction phase, monitor the contractor's schedule, deal with change orders, and make meetings effective and efficient.

Gain an understanding of the Owner's role in quality assurance, project safety and project close out, and tips in reviewing a contractor's pay request.

### 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

# 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-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.

### 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

**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

A select number of OTI courses are available in virtual form, and a new "BIM For Owners" course is being developed in 2023. See above for pricing and contact COAA staff for information.

Visit [COAA's Events page](#) to register for free live offerings throughout the year.



**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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