

# COAA Owner Training Institute®

TRAINING FOR OWNERS, BY OWNERS



## Course Catalog

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



# FOR OWNERS BY OWNERS

<https://coaa.org/Owner-Training-Institute>

## COAA Owner Training Institute®

**Training for Owners' project managers - from the Owner's perspective - provided through 12 courses developed and presented by a team of industry experts**

### WHO SHOULD ATTEND COAA'S OTI COURSES?

OTI COURSES ARE SPECIFICALLY GEARED TOWARD OWNERS' project management staff at all levels, but some courses may also be valuable for other members of an Owner's organization, such as operations & maintenance, planning, and procurement officials.

The course content is designed with an "early to intermediate" mindset, but everyone who's interested in learning how to be a better Owner gains value from participating in COAA's OTI courses.

OTI courses are intended to provide strategies and tools that a PM can immediately apply on his/her projects regardless of their level of experience.

#### "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; have been working for an Owner for at least a few years; 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.

# We Can Bring Owner Training Courses to You!

<https://coaa.org/Owner-Training-Institute>

## IN-HOUSE TRAINING

*"I've been in the construction field for 18 years and this gave me a lot of new information!"*

-QUOTE FROM AN OTI ATTENDEE EVALUATION

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.

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

- Less 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
- Courses can be held at a time that is convenient to you

## OTI ADVISORY GROUP

Terry Cook

*University of Maryland, Baltimore County*

Rachel Prinkey

*Penn State University*

Mike Kenig

*Holder Construction*

Jack Mumma

*Michigan State University*

Rich Tilghman

*Pepper Construction (retired)*

Warren Williams

*Lord Aeck Sargent*

Gary Van Alstyne

*Loudon County (VA) Public Schools*

## 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 audio visual) 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.



**Training For Owners, By Owners**

# Course Delivery & Fees

<https://coaa.org/Owner-Training-Institute>

## 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

## 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 a level of training that does not currently exist in the industry outside of a two or four-year degree. Even those degrees do not necessarily provide exposure to the level of experience embodied by each OTI course's three-person team of instructors, which represents the perspectives of the Owner, designer, and constructor.

The courses are highly interactive, with small group exercises, role playing, and large group discussions scheduled to complement the traditional instruction. This format 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.

*"The quality and experience that the instructors brought to class was invaluable!"*

-QUOTE FROM AN OTI ATTENDEE EVALUATION

**Training For Owners, By Owners**

# COAA OTI<sup>®</sup> In-house Training Request Form

<https://coaa.org/Owner-Training-Institute>

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)
- Project Management: An Owner's Perspective (1.5 DAYS)
- Schedule Management (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 [OTI@coaa.org](mailto:OTI@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 email [OTI@coaa.org](mailto:OTI@coaa.org).

**Construction Owners Association of America | Owner Training Institute<sup>®</sup>**  
5000 Austell Powder Springs Road, Suite 217 | Austell, Georgia 30106  
(800) 994-2622 | [coaa@coaa.org](mailto:coaa@coaa.org)

**Training For Owners, By Owners**

# OTI<sup>®</sup> Courses

## Core Skills

<https://coaa.org/Owner-Training-Institute>

### 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, including:

- The role of the Owner Project Manager and management tips
- The pros and cons of the different project delivery methods and how to select a method
- Elements of programming and strategies to engage stakeholders and make decisions
- How to do a master project schedule and strategies to stay on schedule
- An overview of design team and construction team selection options and sharing of lessons learned
- Management of the design process and strategies to achieve the balance of quality, cost, and schedule
- Tips in the management of the budget
- Tactics to manage the construction administration phase and close out

### 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

### Schedule Management

**Duration: One Day**

Learn best practices for the development of an Owner's project schedule including the "Do's 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.



# OTI<sup>®</sup> Courses

## Process Management

<https://coaa.org/Owner-Training-Institute>

### Construction Process Management

**Duration: One Day**

Learn about 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 employ 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.)



*"I have tangible materials  
I can refer to in the future.  
The examples simplified  
and explained the subject matter  
and the perspectives were real."*

– QUOTE FROM AN OTI  
ATTENDEE EVALUATION

# OTI<sup>®</sup> Courses

## Project Delivery

<https://coaa.org/Owner-Training-Institute>

### 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<sup>®</sup> Courses

## Project Team Selection

<https://coaa.org/Owner-Training-Institute>

### 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.



**Check out our video here!**

*"The tools provided to attendees through OTI will enable an Owner to avoid claims and will enhance the value on every project because of the heightened awareness of the Owner's representative."*

-JOHN SIER,  
KITCH DRUTCHAS WAGNER  
VALITUTTI & SHERBROOK