

State Architect's Office

SAO College

Seminars for the Design & Construction Industry
Fall Semester - October 8, 2003



Ohio Department of Administrative Services

Bob Taft, Governor

Scott Johnson, Director

Greg Jackson, Assistant Director/Ohio Chief Information Officer

Nikki Guilford, Assistant Director

General Services Division

Richard M. Hickman, Deputy Director

Roger B. Booker, AIA, State Architect, Office of the State Architect

4200 Surface Road

Columbus, OH 43228-1395

v: 614.466.476; f: 614.644.7982

SAO College Fall Semester 2003

Wednesday, Oct. 8, 2003

8 a.m. - 3:30 p.m. (Registration begins at 7:30 a.m.)

Columbus Marriott Northwest

5605 Paul G. Blazer Memorial Parkway

Dublin, OH 43017

Registrations due: Oct. 2

Comment from attendee of SAO College Spring Semester '03:

"Having attended all semesters of SAO College, they keep getting better. The information continues to provide an understanding of how SAO operates and how best to do business with SAO and its clients."

- Administrative Controls Management

Overview...

Sponsored by the State Architect's Office (SAO), SAO College Fall Semester provides an excellent opportunity for attendees to learn more about the SAO process and the management of state projects.

The seminar covers topics such as plan reviews and permits, the Architect-Engineer selection process, the Contractor bid award process, change orders, partnering and avoiding claims. Other topics include the May 2003 DAS Standard Conditions of Contract for Construction (Front End) and demonstrations of the Microsoft® Excel versions of the Associate, Construction Manager and Contractor payment request forms. A panel discussion will address bid information escrow and expanded CSI format changes.

New courses for this semester include information about the EDGE (Encouraging Diversity, Growth and Equity) program, interior design, energy conservation, local administration and project close-out. Topics are presented by an SAO staff expert in conjunction with a specialist from the architectural, construction or legal community, or from a state agency, state college or state university.

Who Should Attend...

Architects	Consultants	Legal Counselors	State Agency Representatives
Business Office Personnel	Contractors	Marketing Professionals	State College/University Representatives
Construction Managers	Engineers	Project Managers	Subcontractors

All levels of staff are encouraged to attend, especially those who specifically deal with the issues being presented.

Continuing Education Credits...

Graduates of SAO College Fall Semester may be awarded up to:

- 6.5 learning units from the American Institute of Architects (AIA)*
- 6.5 credits in business from the Ohio Construction Industry Examination Board (OCIEB)*

**Subject to AIA or OCIEB criteria. Note: Courses repeated from the spring 2003 semester of SAO College may not be applicable.*

All attendees will be mailed a certificate of attendance from the State Architect's Office following the seminar.

Agenda and Registration...(Online registration: www.ohio.gov/saoregistration)

See inside for agenda and registration form. Registrations are due by Oct. 2 to ensure a seat. Online registrations are preferred. A confirmation letter or e-mail will be sent to all registrants. For more information, contact Angela Carder at 614.752.0448 or via e-mail at angela.carder@das.state.oh.us.

Payment Information...

The registration fee is \$175 per person. See inside panel for payment information. Sorry, cash and credit cards are not accepted.

Morning Schedule (choose one class for each time frame)

An expert from the State Architect's Office (SAO) and another specialist from the architectural, construction or legal community, or from a state agency, college or university will co-present most sessions. A final list of presenters will be available at the seminar. Times shown include a 10-minute break between sessions.

7:30 a.m. Registration, Continental Breakfast (registration area)

8 a.m. Welcome by Roger B. Booker, AIA, State Architect (main ballroom)

8:30 - 9:30 a.m. (All) **A New Way to Score Points**
EDGE Program (Encouraging Diversity, Growth and Equity)

New

Tract Leader: Roger B. Booker, AIA, SAO
Co-presenter: Jeff Westhoven, Office of Procurement Services

- Program definition
- Application/certification
- Scoring
- Mentor/protégé

8:30 - 9:30 a.m. (AE, CM, O)⁺ **Honey, I Shrank the Utility Bills!**
Ways to Conserve Energy at Ohio Facilities

New

Tract Leader: Oscar Zanganeh, SAO, Energy Svcs.
Co-presenter: John Sommer, Ohio Dept. of Mental Retardation and Developmental Disabilities

- Performance contracts
- Capital projects
- Green Lights & Energy Star programs
- Design/review

8:30 - 9:30 a.m. (All) **Designing Spaces**
Interior Design Services

New

Tract Leader: Becky Wendel, SAO, Interior Design Services
Co-presenter: Mark Hutchison, Office of Procurement Services

- Introduction to Interior Design Services
- Design for efficient use of space
- Understanding the state term schedule for purchasing

9:30 - 11 a.m. (All) **SAO Finally Throws Out the Typewriter**
New Associate, CM and Contractor Payment Forms/Change Order Form

Tract Leader: Fred Holcomb, SAO
Co-presenter: Kathy Stewart, SAO

- Electronic forms (Microsoft® Excel)
- What, where and how
- Future pay requests handled online

9:30 - 11 a.m. (All) **Are We Done Yet?**
Responsibilities and Procedures to Closeout a Project

New

Tract Leader: Arden E. Freeman, AIA, SAO
Co-presenter: Stephen A. Middleton, AIA, The Ohio State University

- Contractor, Associate and Owner's project responsibilities
- Project schedule/scheduling closeout activities
- The closeout checklist

9:30 - 11 a.m. (AE, CM, O) **Making the Cut**
Avoiding Common Mistakes on Associate Proposal Submittals

Tract Leader: Thomas R. Poulton, AIA, SAO
Co-presenter: Angela Carder, SAO

- Why relevant information is important on the ADM-0255 form
- Identifying the right personnel in the application
- The need for improved Consultants' responses
- Pre-qualified Consultant services

11 a.m. - Noon (AE, CM, O) **Honey, I Shrank the Utility Bills!**
Ways to Conserve Energy at Ohio Facilities

New

Tract Leader: Oscar Zanganeh, SAO, Energy Svcs.
Co-presenter: John Sommer, Ohio Dept. of Mental Retardation and Developmental Disabilities

- Performance contracts
- Capital projects
- Green Lights & Energy Star programs
- Design/review

11 a.m. - Noon (O) **Making It On Your Own**
Local Administration for Beginners

New

Tract Leader: Keith Wagenknecht, AIA, SAO
Co-presenter: Thomas R. Poulton, AIA, SAO

- Knowing the rules
- Capital budgeting/timing
- Requesting authority
- General process

11 a.m. - Noon (All) **Money Is Not Everything**
Contractor Bid Evaluation Process/ New RBI Form/Responsibility Policy

Tract Leader: Arden E. Freeman, AIA, SAO
Co-presenter: Dave Calhoun, Ohio Dept. of Rehabilitation & Correction

- Apparent Low Bidder vs. recommended Responsible Bidder
- New SAO policy for Contractor bid eval.
- Preparing the Responsible Bidder Information (RBI) form
- How is the RBI form used?

Comment from attendee of SAO College Spring Semester '03:
"I found the day to be very informative as a first-time attendee. I agree and understand with the views that were presented and try to strive in my young career to be cooperative and pro-active."
- Dugan and Meyers Construction Co.

⁺(Primary Audience: All, AE=Architect/Engineer, C=Contractor, CM=Construction Manager, O=Owner)

Afternoon Schedule (choose one class for each time frame)

An expert from the State Architect's Office (SAO) and another specialist from the architectural, construction or legal community, or from a state agency, college or university will co-present most sessions. A final list of presenters will be available at the seminar. Times shown include a 10-minute break between sessions.

Noon Buffet Lunch (main ballroom)

12:30 - 2 p.m. (All) Lunch Presentation: Open Panel Discussion

Moderator: Roger B. Booker, AIA, SAO

Panel Members:

Various experts representing special segments of the industry, such as Contractors, Construction Managers, Associates and Owners as well as representatives from the State Architect's Office.

Discussion topics may include:

- Challenges/questions from the floor
- Bid information escrow
- Expanded CSI format changes

2 - 3:30 p.m. (All) Three Ways to Make Easy Money Project Partnering/Claims/ADR

Tract Leader: Keith Wagenknecht, AIA, SAO

Co-presenter: Gene Belew, Dynalectric (retired)

- Establish and maintain trust
- Proactive, not reactive
- Avoiding claims
- Alternative Dispute Resolution (ADR)

2 - 3:30 p.m. (All) Stay Out of Trouble: Building Codes and Permits Highlights of New Policies & the State Permit Process

Tract Leader: Arden E. Freeman, AIA, SAO

Co-presenters: Jeffrey S. Tyler, Ohio Dept. of Commerce, Division of Industrial Compliance, and Chief Michael G. Kraft, Ohio Dept. of Commerce, State Fire Marshal's Office

- Working with building & fire code authorities to achieve plan approval
- What is the new permit fee schedule?
- What is the difference between plan approval process & field inspector process?
- When things go wrong - what are the correct steps of action?

2 - 3:30 p.m. (All) It's What's Up Front That Counts New Standard Conditions of Contract for Construction - May 2003

Tract Leader: W. Bruce Curtis, SAO

Co-presenter: Kevin Russell, SAO

- Expanded summary of changes and additional details
- New Bid Information Escrow process
- Revised coordination meetings/drawings process
- Revised Subcontractor/Material Supplier approval process
- Refer to Front End at www.ohio.gov/sao

Comment from attendee of SAO College Spring Semester '03:
"Presenters were open to all questions and were able to answer them. It's great to see the new ideas and initiatives coming from SAO."

- University of Cincinnati

Registration Information...

Event Date: Wednesday, Oct. 8, 2003

Registration Deadline: Thursday, Oct. 2

Online Registration: www.ohio.gov/saoregistration

Fax Registration: 614.644.7982

Registration Fee:

The registration fee is \$175 per person. Registrations are due by Oct. 2 to ensure a seat. See registration form for payment information. A confirmation letter or e-mail with directions and parking information will be sent to all registrants.

Payment Information:

While payment is accepted the day of the event, payment with registration is appreciated. Credit cards and cash are not accepted. Paid cancellations received before Oct. 2 will be refunded 100 percent; paid cancellations received after Oct. 2 will be refunded 50 percent.

All non-paid cancellations after Oct. 2 and all no shows will be billed at 50 percent of the registration fee.

Questions:

Contact Angela Carder at 614.752.0448 or via e-mail at angela.carder@das.state.oh.us.

SAO thanks the following organizations* for their assistance in presenting SAO College Fall Semester:

Gene Belew, Dynalectric (retired)
Ohio Dept. of Administrative Services - Office of Procurement Services
Ohio Dept. of Commerce - Division of Industrial Compliance
Ohio Dept. of Commerce - State Fire Marshal's Office
Ohio Dept. of Mental Retardation and Developmental Disabilities
Ohio Dept. of Rehabilitation and Correction
The Ohio State University

*as scheduled at time of printing

*(Primary Audience: All, AE=Architect/Engineer, C=Contractor, CM=Construction Manager, O=Owner)

Registration Form

SAO College Fall Semester 2003



Oct. 8, 2003 - Columbus Marriott Northwest, Dublin, Ohio

Tuition: \$175 per person. **Registration deadline is Oct. 2.** Please mail your registration form to the address below along with your personal/business check or money order made payable to Treasurer, State of Ohio. While payment is accepted the day of the event, payment with registration is appreciated. Credit cards and cash are not accepted. Paid cancellations received before Oct. 2 will be refunded 100 percent; paid cancellations received after Oct. 2 will be refunded 50 percent. All non-paid cancellations after Oct. 2 and all no shows will be billed at 50 percent of the registration fee.

Mail payments to:

Ohio Dept. of Administrative Services
General Services Division
Attention: Business Office
4200 Surface Road
Columbus, OH 43228-1395

**Convenient online registration:
www.ohio.gov/saoregistration**

Online reservations & directions: www.ohio.gov/saoregistration. Fax reservations: 614.644.7982. Questions: Contact Angela Carder at 614.752.0448 or via e-mail at angela.carder@das.state.oh.us.

Name (Mr./Mrs./Ms.) _____ Title _____
Company _____ E-mail _____
Phone _____ Fax _____
Address _____
City _____ State _____ ZIP _____
Special assistance needed: _____

(Note: The Columbus Marriott Northwest is handicap accessible. Buffet lunch includes a vegetarian selection.)

Seminar Choices (please choose only one class per time frame):

Topic selections are on a first-come, first-served basis. You will be notified if your session is full. Lunch begins at noon with a panel discussion from 12:30 - 2 p.m.

8:30 - 9:30 a.m.

- A New Way to Score Points** *(New)*
(EDGE Program: Encouraging Diversity, Growth and Equity)
- Honey, I Shrunk the Utility Bills!** *(New)*
(Ways to Conserve Energy at Ohio Facilities)
- Designing Spaces** *(New)*
(Interior Design Services)

11 a.m. - Noon

- Honey, I Shrunk the Utility Bills!** *(New)*
(Ways to Conserve Energy at Ohio Facilities)
- Making It On Your Own** *(New)*
(Local Administration for Beginners)
- Money Is Not Everything**
(Contractor Bid Evaluation Process/RBI Form/Responsibility Policy)

9:30 - 11 a.m.

- SAO Finally Throws Out the Typewriter**
(New Associate, CM and Contractor Payment Forms/Change Order Form)
- Are We Done Yet?** *(New)*
(Responsibilities and Procedures to Close-out a Project)
- Making the Cut**
(Avoiding Common Mistakes on Associate Proposal Submittals)

2 - 3:30 p.m.

- Three Ways to Make Easy Money**
(Project Partnering/Claims/ADR)
- Stay Out of Trouble: Building Codes & Permits**
(Highlights of New Policies & the State Permit Process)
- It's What's Up Front That Counts**
(New Standard Conditions of Contract for Construction - May 2003)