

State Architect's Office presents...



SAO College

Seminars for Ohio's Design & Construction Industry  
Fall Semester  
Monday, October 25, 2004

7:30 a.m. - 3:30 p.m.  
Columbus Marriott Northwest  
Dublin, Ohio 43017  
Registrations due: October 20

Spring Semester 2005  
SAO College  
Ohio Design and Construction Expo  
Columbus  
February 2, 3



## Overview

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

The seminar covers topics such as updates about the new EDGE (Encouraging Diversity, Growth and Equity) program, CSI MasterFormat 2004, Sustainable Design and the LEED (Leadership in Energy & Environmental Design) program. Attendees will learn how to prepare the ADM-0255 form, invoice for professional services and construction contracts, issue change orders and close out projects. Other topics include building codes and permits, partnering and interior design. A panel discussion will focus on topics of timely interest to the industry.

Each topic is 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
- Business Office Personnel
- Contractors
- Consultants
- Construction Managers
- Engineers
- Legal Counselors
- Marketing Professionals
- Project Managers
- State Agency Representatives
- Subcontractors

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

### ■ Continuing education credits...

Graduates of SAO College Spring 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)\*
- 6.5 CEU credits for CPSMs from the Society for Marketing Professional Services (SMPS)\*

*\*Subject to AIA, OCIEB or SMPS criteria. Note: Courses that an attendee is repeating from the Spring 2004 Semester of SAO College may not be eligible for credit. All attendees will be mailed a certificate of attendance from the State Architect's Office following the seminar.*

### ■ Registration, tuition and payments...

- Online registrations preferred: <http://www.gsd.das.state.oh.us/sao/saoregistration.htm>.
- Fax registrations: 614.644.7982.

The registration fee is **\$175 per person**. Registrations are due by Oct. 20 to ensure a seat. See registration form for payment information, registration deadlines and cancellation policies. A confirmation e-mail will be sent to all registrants. Those with questions may contact Tiffany Plasencio at 614.752.0448 or via e-mail at [tiffany.plasencio@das.state.oh.us](mailto:tiffany.plasencio@das.state.oh.us).



## Morning Agenda

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.

7:30 - 8 a.m.

Registration, Continental Breakfast (registration area)

8 - 8:15 a.m.

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

**Class 1** | What's the Big Deal? (CSI MasterFormat 2004)

*Tract Leader: Nick Cassidy, SAO; Co-presenters: Lane Beougher, Braun & Steidl Architects, and Robert Simkins, SAO*

*Primary Audience: A, C, CM, O*

- | History of MasterFormat
- | Expand MasterFormat
- | Describe new outline
- | Proposed dates of application
- | Manual of practice update

**Class 2** | Let's Start With a Plan (Dealing with interior office changes)

*Tract Leader: Thomas R. Poulton, AIA, SAO; Co-presenter: Jennifer Frear, IDS, SAO*

*Primary Audience: O*

- | Intro to Interior Design Services (IDS)
- | Apply DAS office guidelines
- | Prepare programming
- | Begin office planning

**Class 3** | Forms/Schmorms - Let Me Design! (New SAO forms for Associates and CMs)

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

*Primary Audience: A, CM, O*

- | New Associate payment request
- | New CM payment request
- | Change Order billings
- | Agreement billings
- | Reimbursables
- | Other new forms

8:30 - 9:20 a.m.  
(choose one class)

**\*Primary Audience:**

A = Associate

C = Contractor

CM = Construction Manager

O = Owner (State Agency  
or College/University)

**Class 1** | Three Ways to Make Easy Money (Project partnering, claims and ADR)

*Tract Leader: Keith Wagenknecht, AIA, SAO; Co-presenter: Varies*

*Primary Audience: A, CM, O*

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

**Class 2** | Are We Done Yet? (Closing out a project)

*Tract Leader: Arden E. Freeman, AIA, SAO;*

*Co-presenter: Thomas I. Converse, Renouveau Design, Inc.*

*Primary Audience: A, C, CM, O*

- | Who is responsible for what? | Scheduling/closeout activities
- | Closeout checklist | Retainage issues

**Class 3** | Making the Cut (AE, CM and Consultant application process)

*Tract Leader: Thomas R. Poulton, AIA, SAO; Co-presenter: Varies*

*Primary Audience: A, CM, O*

- | Preparing the ADM-0255 form | Identifying the right team
- | Federal SF 330 form update | Pre-qualified Consultant services

9:30 - 10:50 a.m.  
(choose one class)

**Class 1 | Hey, I'm a Contractor, Not an Accountant! (New SAO forms for Contractors)**

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

*Primary Audience: C, O*

- | New Contractor payment request
- | Subcontractor and Material Supplier form
- | Change Orders and other new forms

**Class 2 | Green Building - It's Not the Color of the Building  
(Sustainable Design and the LEED program)**

*Tract Leader: Oscar Zanganeh, P.E., C.E.M., Energy Services, SAO;*

*Co-presenters: Michael J. Berning, P.E., LEEDAP, and Scott Huffman, both of Heapy Engineering*

*Primary Audience: A, C, CM, O*

- | Leadership in Energy and Environmental Design (LEED) overview & update
- | LEED specifics and considerations
- | Sustainable Design
- | State's approach to LEED program

11 - 11:50 a.m.  
(choose one class)

**Class 3 | I Made the Cut - Now What? (Securing the AE, CM and Consultant Contract)**

*Tract Leader: Thomas R. Poulton, AIA, SAO; Co-presenter: Varies*

*Primary Audience: A, CM, O*

- | Interviewing tips
- | Technical proposal guidelines
- | Fee proposal guidelines
- | Getting started processes



## Afternoon Agenda

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 - 12:30 p.m.  
Buffet Lunch (main ballroom)

12:30 - 1:50 p.m.

Lunch Presentation: Open Panel Discussion (main ballroom)

*Moderator: Roger B. Booker, AIA, SAO; Panel Members: Varies*

*Primary Audience: A, C, CM, O*

| Shared use of Construction Schedule Consultant services and other industry topics

**Class 1 | Stay Out of Trouble (Building codes and permits)**

*Tract Leader: Vijay Bhalla, SAO; Co-presenter: Jeffrey S. Tyler, Ohio Dept. of Commerce*

*Primary Audience\*: A, C, CM, O*

- | Achieving plan approvals | New permit fee schedule
- | Plan approvals/field inspections | When things go wrong

**Class 2 | A New Way to Score Point (EDGE program)**

*Tract Leader: Roger B. Booker, AIA, SAO*

*Primary Audience\*: A, C, CM, O*

- | Program definition | Application/certification
- | Scoring | Mentor-Protégé Program

**Class 3 | It's What's Up Front That Counts (May 2003 Front End application process)**

*Tract Leader: Kevin Russell, SAO; Co-presenter: Ned Thiell, SAO*

*Primary Audience\*: A, C, CM, O*

- | Summary of changes | Open forum discussion

2 - 3:20 p.m.  
(choose one class)

**\*Primary Audience:**  
A = Associate  
C = Contractor  
CM = Construction Manager  
O = Owner (State Agency  
or College/University)



### **Comments from satisfied attendees...**

*“Another year of practical advice which can be immediately applied to improve what we do and how we do it.”*  
- Project and Construction Services, Inc.,

*“Providing an inside look at how you offer reviews and make selections of firms will allow me to better position our firm and staff to be selected. I will also be able to better manage my time in preparing our submittal based on the information and clarification provided at the seminar.”* - CT Consultants

*“Very professionally presented program. The presenters were knowledgeable, experienced and helpful. The registration process was also very professionally performed.”* - The Architectural Group, Inc.

*“Always informative and a great forum to keep current with state processes and thoughts.”* - Unknown

*“SAO College is an excellent presentation by professionals involved in our industry who appreciate the true meaning of risk management.”* - Burgess & Niple

*“SAO College is a great way to share information to A/E, Contractor and using agencies.”* - Unknown



### **Questions...**

Contact Tiffany Plasencio at 614.752.0448 or via e-mail at [tiffany.plasencio@das.state.oh.us](mailto:tiffany.plasencio@das.state.oh.us).

SAO College Fall Semester 2004 | Columbus - Marriott Northwest  
(Registrations due: Oct. 20)

■ **Tuition**

Tuition is \$175 per person. Please mail your registration form along with your personal/business check or money order made payable to *Treasurer, State of Ohio* to: Ohio Dept. of Administrative Services, General Services Division, Attention: Business Office, 4200 Surface Road, Columbus, OH 43228-1395. Payment prior to the seminar is appreciated. Cash is not accepted. State agencies will be billed by intrastate transfer voucher. State colleges and universities may pay using intrastate transfer voucher.

■ **Cancellation Policy**

Paid registrations cancelled by Oct. 20 will receive a full refund. Paid registrations cancelled after Oct. 20 will receive a 50 percent refund upon request. Unpaid registrations cancelled after Oct. 20 and no-shows will be billed at 50 percent of the registration fee. *Note to credit card purchasers:* Registrations cancelled by Oct. 20 will be fully credited to the account. Registrations cancelled after Oct. 20 will be refunded at 50 percent via check.

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**Seminar Choices...**

**8:30 - 9:20 a.m.**

- What's the Big Deal?**
- Let's Start With a Plan**
- Forms/Schmorms - Let Me Design!**

**9:30 - 10:50 a.m.**

- Three Ways to Make Easy Money**
- Are We Done Yet?**
- Making the Cut**

**11 - 11:50 a.m.**

- Hey, I'm a Contractor, Not an Accountant!**
- Green Building - It's Not the Color of the Building**
- I Made the Cut - Now What?**

**Noon - 1:50 p.m.**

**Lunch Presentation - Open Panel Discussion**

**2 - 3:20 p.m.**

- Stay Out of Trouble**
- A New Way to Score Points**
- It's What's Up Front That Counts**

Choose one class  
per session.

■ Registration Slip

Online reservations and directions: [www.gsd.das.state.oh.us/sao/saoregistration.htm](http://www.gsd.das.state.oh.us/sao/saoregistration.htm). Fax reservations: 614.644.7982. Topic selections are on a first-come, first-served basis. You will be notified if your session is full.

*Note: The Columbus Marriott Northwest is fully accessible to all visitors. Buffet lunch includes vegetarian and non vegetarian selections.*

**Name:** \_\_\_\_\_ **Title:** \_\_\_\_\_

**Company:** \_\_\_\_\_ **E-mail:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **ZIP:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

**Special assistance needed:** \_\_\_\_\_

*Questions: Contact Tiffany Plasencio at 614.752.0448 or via e-mail at [tiffiny.plasencio@das.state.oh.us](mailto:tiffiny.plasencio@das.state.oh.us).*



Ohio Department of Administrative Services  
Bob Taft, Governor  
Scott Johnson, Director  
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: 614.466.4761; f: 614.644.7982





General Services Division  
Office of the State Architect  
4200 Surface Road  
Columbus, OH 43228-1395

