
COGENCE Alliance
Owners+Architects+Engineers+Contractors

2023 CHAPTER **GUIDEBOOK**

*Your guide to being part
of a local chapter.*

“The task of leadership is to create an alignment of strength... making a system’s weaknesses irrelevant.”

PETER DRUCKER

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ABOUT US

Cogence Alliance has a singular focus: to improve project outcomes through collaborative delivery methods. The challenge at hand is two-fold: (1) the design and construction industry is facing increased demands to produce greater value, higher quality, and faster project delivery, and (2) the industry lags in productivity gains, is often contentious, and frequently fails to deliver successful outcomes. Complex, fragmented teams are easily driven by self-interest rather than shared purpose.

As a nonprofit, chapter-based membership organization, Cogence Alliance partners are senior members of their organizations who have direct, authoritative, leadership responsibility in project delivery decisions. Additionally, Cogence is intentionally formed to achieve a balanced number of owners, architects, engineers, construction managers, trade contractors and affiliates (supporting industries)—a core principle of the organization to ensure that there is equal voice on issues and to provoke vibrant discussion around issues central to industry improvement.



OUR MISSION

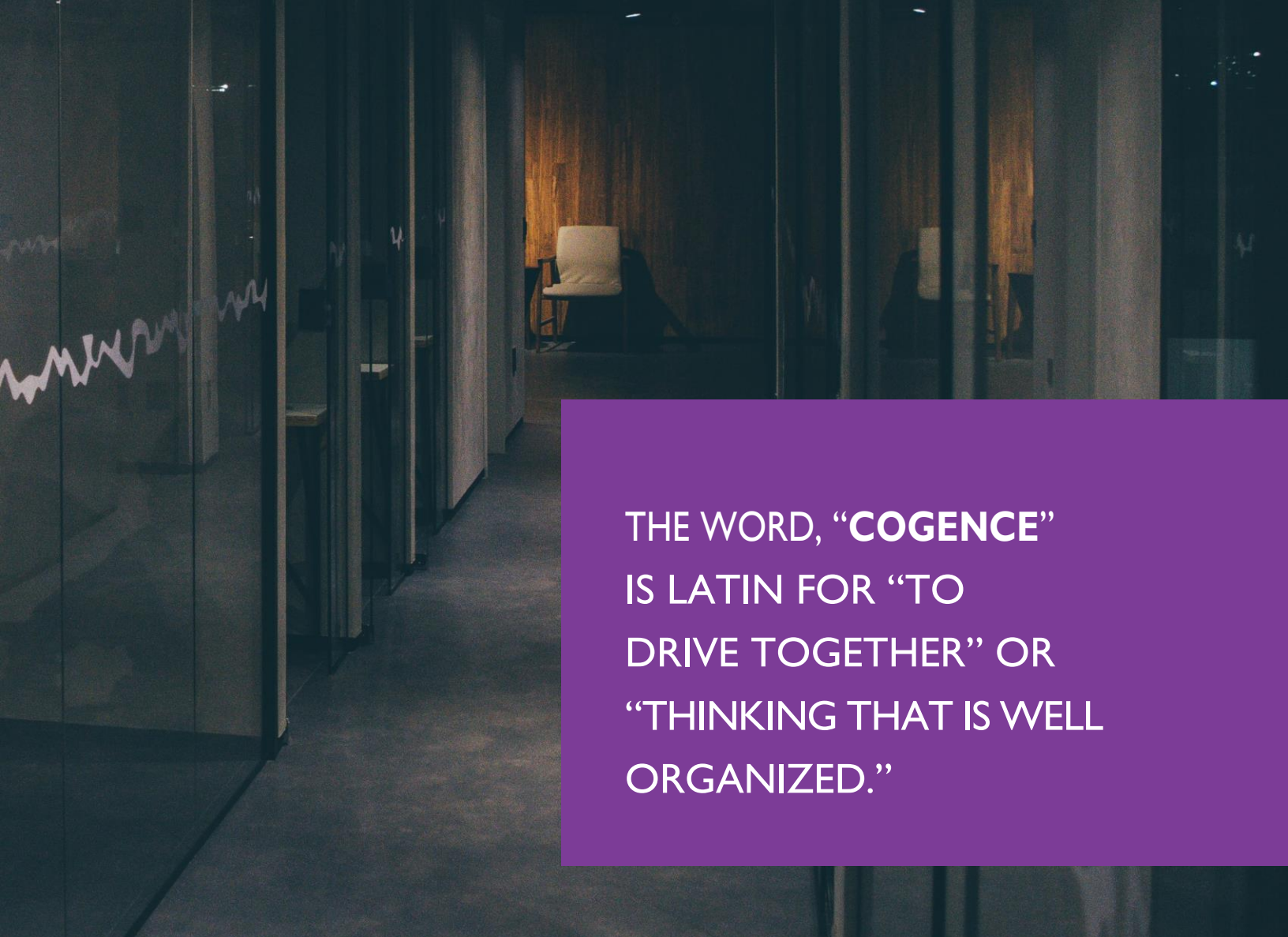
The mission of Cogence Alliance is to bring owners and developers, architects and engineers, construction managers and contractors, and allied industry affiliate professionals together to advocate and be a resource for improved project delivery.

OUR HISTORY

The Cogence Alliance was created in 2015, when a small committee of industry leaders from the Greater Cleveland, Ohio area—who all shared the vision of bringing owners, architects, engineers, construction

managers, and trade contractors together—believed that project delivery could be significantly improved for the benefit of all involved. Since its first meeting, the organization was shaped around this conviction that to improve the design construction industry, it must begin with meaningful and open communication between the leadership of all entities participating in the process.

Early on, the organization was formalized and established as a not-for-profit 501(c)(6) entity with a governing National Board Of Directors and by-laws to sustain the organization. Rooted in Northeast Ohio, Cogence Alliance quickly grew to more than fifty



THE WORD, “**COGENCE**”
IS LATIN FOR “TO
DRIVE TOGETHER” OR
“THINKING THAT IS WELL
ORGANIZED.”

partners. In 2019, another small group of passionate industry leaders—now from the Greater Columbus, Ohio area—created a second chapter of Cogence in Central Ohio. And in 2023, the Southwest Ohio Chapter serving the Cincinnati and Dayton areas was added.

By the end of 2020, Cogence Alliance updated its by-laws to more clearly establish Cogence Alliance as a regional, chapter-based organization, including the formation of Chapter Board of Directors and an overseeing National Board of Directors of the entire organization.

OUR VISION

The vision of the Cogence Alliance is to transform the design and construction industry, with a goal of industry-wide change that creates a collaborative project culture that leverages each team member’s strengths; reduces risks and improved outcomes for everyone; and supports the creation of projects that are both financially successful and enjoyable.

WHAT WE DO

Cogence Alliance brings together owners and developers, architects and engineers, construction managers and contractors, and allied industry professionals within chapter regions, who are able to advocate for industry change through programs and advocacy. Additionally, Cogence helps to facilitate professional networking, and through its Emerging Leaders program, offers mentors to mid-career professionals.

PROGRAMMING

A large part of Cogence Alliance is its programming, where partners from across stakeholder groups come together to tackle issues and challenges facing the design construction industry. Roundtable discussions, provide some of the greatest value to partners. Roundtables are bi-monthly programs, put on by each chapter, where partners engage pressing topics within their region in an open, interactive, and challenging conversation. Programs are built on highly relevant themes that center on methods of creating project cultures that are capable of fostering true collaboration.

Successful programs have focused on understanding risk from the perspective of each stakeholder group, the opportunities available to address these risks, and the paths available to improve outcomes. Aspects of team culture are explored to gain understanding of how they affect our risks and project outcomes. Programs are structured as partner roundtable discussions, a format allowing for a collegial, yet substantive and challenging exchange of thoughts and experiences. Typically, 90-minutes to two hours in length, sessions are facilitated by experienced partners and guest speakers who provide valuable insight, perspective, and expertise to the discussions. While in-person roundtable discussions are preferred, virtual roundtable discussions can be successfully hosted with small group breakout discussions included in the program.



Cogence Alliance also hosts other types of programs, including larger, collaborative programs coordinated across chapters. These include multi-day programs that are topic-centered summits and think tank activities, as well as educational workshops.

ADVOCACY

As a part of its vision, Cogence Alliance is focused on the larger goal of industry-wide, design and construction change—seeking to improve project delivery through collaboration. Through Cogence Alliance, all partner groups in the industry share resources and develop new lines of thought to move the industry forward. Since its inception, Cogence has developed some of these approaches already,



including the Cogence Alliance Guaranteed Maximum Price (GMP) process, as well as insights into risk and leadership. Cogence has also partnered with other industry associations and documented the outcomes of its programs in a variety of topics. Additionally, as the COVID-19 pandemic ultimately shapes “new normals” across all industries, Cogence is standing at the front-of-the-line to advocate for change that will drive the design and construction industry forward in ways that best meet new owner needs and requirements. While regional advocacy continues at the chapter-level, a committee of the Cogence Alliance National Board of Directors is specifically focused on industry-wide advocacy that can impact state and/or national change across partner groups.

NETWORKING & MENTORING

As a partner of Cogence Alliance, you will recognize the importance of driving forward change in a collaborative process—and you will be able to network and connect with others that value collaboration across partner groups. Programs offer the opportunity to not only connect with others both within and outside of your partner group, but also the opportunity to discuss and collaborate on ideas and resources. Additionally, the Emerging Leaders program offers partners the opportunity to be mentors to mid-career professionals within the design and construction industry, providing personal and professional guidance for individuals as they advance in their field.

CHAPTER GOVERNANCE

Regional chapters are the foundation for Cogence Alliance, as a nonprofit member association. Chapters are individually governed by a Chapter Board of Directors. Cogence utilizes an integrated model of governance and operations, so all chapter activities are overseen by Cogence Alliance National Board of Directors. Therefore, chapters are not separate organizations and function as a regional expression of Cogence Alliance.

CHAPTER REQUIREMENTS

Chapters have a short list of requirements for sustainability to be granted. This includes a fully seated Chapter Board of Directors with a minimum of ten (10) partners who pay annual dues, and at least one (1) partner from each stakeholder group. Additionally, the chapter must host at least six (6) chapter programs per calendar year, and hold at least, bi-monthly Chapter Board meetings. If these requirements are not met, Cogence Alliance National Board of Directors will review chapter feasibility and determine next steps, including the possible revocation of chapter status.

New chapters upon meeting these requirements will be presented to Cogence Alliance National Board of Directors for initiation as a Cogence Alliance chapter.

CHAPTER GOVERNANCE

Each Cogence Alliance Chapter is governed by its Chapter Board of Directors, who are elected by the partnership.

Like all activities within Cogence, chapter boards must be as balanced as possible in stakeholder group representation. The Chapter Board, includes the following seven (7) positions:

- **PRESIDENT**

The Chapter President provides overall leadership to the Chapter Board of Directors and helps guide the chapter's success in partnership, programming, and the emerging leaders program. The Chapter President also serves on the Cogence Alliance National Board of Directors.

- **VICE-PRESIDENT**

The Chapter Vice-President serves as a primary support leader to the President, assisting in areas and/or attendance whenever necessary. The Vice-President is also specifically responsible for the stewardship and oversight of all chapter communications.

- **SECRETARY**

The Chapter Secretary has two primary responsibilities: (1) ensuring chapter compliance to by-laws and operating guidelines, and (2) lead the annual nominating process for board roles.

- **TREASURER**

The Chapter Treasurer establishes and maintains the chapter's operating budget and authorizes expenses. The treasurer is also responsible for regular financial reporting.

- **CHAIR, PROGRAMS COMMITTEE**

The Chapter's Program Committee Chair is responsible for the oversight of the chapter's programs and ensuring that all Cogence Alliance curriculum is followed appropriately and that each program has its own working committee of volunteers. The Chair is also responsible for ensuring that all program materials, including post-event surveys, are appropriately submitted to the appropriate Cogence Staff Member. The committee chair will also be invited to participate in programs review sessions by the Cogence National Program Committee Chair, as applicable.

- **CHAIR, PARTNERSHIPS COMMITTEE**

The Chapter's Partnership Committee Chair is focused on two (2) outcomes: (1) partner engagement and retention, and (2) partner recruitment and orientation. The Chair is also responsible for a balanced roster of partners within each stakeholder group.

- **CHAIR, EMERGING LEADERS COMMITTEE**

The Chapter's Emerging Leaders Committee Chair is responsible for providing leadership and organization to the chapter's program, including emerging leaders volunteer services, the outline and execution of all programming, and the assignment of mentors.





CHAPTER COMMITTEES

Each Cogence Alliance chapter has five (5) working committees: Program, Partnerships, Advocacy, Resource and Emerging Leaders. These committees are led by a chairperson who has a seat on the Chapter Board Of Directors, and the designation of vice-chairperson(s). Partners are strongly encouraged to be an active participant in a committee activity (along with their participation in programs and advocacy).

PROGRAM COMMITTEE

The program committee of each chapter is designed to oversee the implementation of the chapter's calendar of programs. The chapter's program committee, led by its chair, is responsible for executing the annual calendar of programs, including but not limited to the dates, times and format(s) of each program; the assignment of program facilitators, including the balanced representation of partner groups; the marketing and awareness of the program to chapter partners; and, the execution and submission of all program materials, including

program evaluations. Like all parts of Cogence, the program committee should be comprised of a balance in partner groups, consisting of five (5) to twelve (12) persons. Individual roundtable teams should consist of five (5) to seven (7) persons.

PARTNERSHIP COMMITTEE

A chapter's partnership committee is responsible for the recruitment of new partners who meet eligibility requirements and continue to support a balanced partner group representation within the chapter. Designated committee members are also responsible for the successful orientation and onboarding of new partners. Additionally, the partnership committee is responsible for overseeing the overall engagement of partners and annual renewal process – working to retain partners and support engagement in programs and committees. Like all parts of Cogence, the partnership committee should be comprised of a balance in partner groups, consisting of five (5) to twelve (12) persons.



EMERGING LEADERS

Emerging Leaders are mid-career professionals within the design construction industry. The program is comprised of a balanced partner group representation, and each Emerging Leader is assigned a partner mentor. The Committee, a group of five (5) to twelve (12) persons, is responsible for the overall oversight of the program, including the recruitment of Emerging Leaders into the three-year program, the recruitment and assignment of Partner Mentors, and the planning and implementation of programs throughout the calendar year, with volunteer leadership by the Emerging Leaders.

ADVOCACY

Cogence advocates for cultural changes that enable improved project delivery. We share research, knowledge, and tools to educate and empower industry stakeholders.

RESOURCE

Each chapter creates resources primarily from the programs they create and produce. These can be in the form of white papers and videos to be shared on our website and social media platforms.

PROGRAMS

Typically, roundtable discussions (in-person or virtual) are the cornerstone of Cogence Alliance programming. The below serves as a guide for each chapter's program committee and for the individual roundtable planning team.

CURRICULUM

As a part of its function, the Cogence Alliance National Board of Directors is responsible for setting the program topics and suggested formats for each chapter's annual calendar of programming. Each chapter will receive a calendar of topics, suggested format(s), sample agendas, and recommended types of speaker(s), as applicable. The Chapter Program Committee is then responsible for the execution of each program topic as applied to the chapter's unique and individual market needs and/or challenges.

PLANNING

A roundtable planning team is assigned to every program, comprised of approximately five to seven individuals from a balanced representation of partner groups.

- **60 DAYS BEFORE**

The roundtable planning team is assigned and participates in a kick-off meeting and/or call.

- **45 DAYS BEFORE**

The planning team hosts a second meeting, if necessary, to determine the program focus and format, as appropriate to the chapter's market.

- **30 DAYS BEFORE**

Invitations are sent to all partners, and if not done already, sent to Cogence administration for inclusion in all other online communications.

- **15 DAYS BEFORE**

Second invitation sent to all non-responding partners. Planning team will review partner registration and individually invite partners if registration list is not balanced, as applicable.

- **OCCASIONALLY**

Event reminders are sent to registered partners, including any pre-work necessary for the program. This may include topic discussion points or questions to consider; relevant article describing the topic; or survey to gather feedback on focused discussion points.

It is the responsibility of the Chapter Administrator to confirm room set-up, group breakouts, catering, and materials/supplies, as applicable.

Program presentation is finalized and sent to Cogence Administration for review of brand compliance. Additionally, presentations should be discussed so that the point of view is understood from each industry partner and identifies a best practice and/or tool(s).

- **NO MORE THAN 5 DAYS AFTER**

The program post-event survey is sent to all attendees.

- **NO MORE THAN 10 DAYS AFTER**

Program materials, as applicable, are made available to all partners.



PARTNERSHIPS

Cogence Alliance Partners are senior members of their organizations who have direct, authoritative, leadership responsibility in project delivery decisions. Additionally, Cogence Alliance is intentionally formed to achieve a balanced number of owners, architects, engineers, construction managers, trade contractors and affiliates from supporting industries—a core principle of the organization to ensure that there is equal voice on issues and to provoke vibrant discussion around issues central to industry improvement.

EXPECTATIONS & COMMITMENT

As a Partner of Cogence Alliance, it is expected that each Partner will remain a fully engaged as an active participant. Active engagement includes attendance and participation in chapter events, as well as participation in surveys or other feedback mechanisms.

As a membership-driven organization, the health and vitality of each chapter is dependent upon the active engagement of its partners. Partners are strongly encouraged to serve on a committee and/or serve as a mentor in the Emerging Leaders program.

As a collaborative group of decision-makers from all aspects of the design construction industry, it is expected that partners avoid the promotion of special interests of their company to others. It is also expected that partners work cooperatively with other partners to ensure Cogence is well managed to meet its goals and objectives.

RECRUITMENT

Partnership with Cogence Alliance is designed for only one executive (up to two) from each respective organization. These individuals are decision-makers and with direct responsibility for project delivery. Additionally, it is important the roster of partners within a chapter is balanced across partner groups. Subsequently, new partners must be approved by the Chapter Board of Directors in order to maintain partner group balance and confirm partner eligibility.

ONBOARDING

The process for Partnership starts with submission of the Partner Application and Commitment Letter. Once a partner has been approved for membership by the Chapter's Board of Directors, s/he will be notified via email and asked to complete the partner profile and partner dues will be invoiced (paid pro rata the first year of membership). It is strongly encouraged that the new Partner attend a Cogence event within the first sixty (60) days, where s/he will be introduced and welcomed at the event. Additionally, Partners are asked to express interest for committee participation, or as a Emerging Leaders Mentor during this introductory period. Partner sponsors are asked to encourage participation of the new partner, as well as be available to answer any questions they may have.





EMERGING LEADERS

The Cogence Alliance Emerging Leaders program provides rising leaders in the design and construction industry with the knowledge and skills to lead with appreciation for the contribution of others. The industry's next chapter of leaders will grow together to drive positive and effective outcomes, thus shaping and sustaining the future of design and construction. Focus areas of the program, include: leadership development; cross-market association; and, mentorship.

The objective of this program is to provide emerging leaders in the design and construction industry the knowledge to understand the value of transforming our industry while empowering them to promote change that will lead to this transformation. Cogence also provides these emerging leaders with a voice to contribute and lead these changes by developing their core skills, expand networking options, and associating with cross market industry leadership.

EXPECTATIONS & COMMITMENT

As an Emerging Leader, it is expected that a participant commitment to a three-year time-period of engagement and attend at least six (6) Cogence events per year, coming to each event fully engaged and informed. Similar to the expectations of partners, leaders are to avoid promotion of any special interest of their company and to work cooperatively with other members to move the Emerging Leaders program forward.

APPLYING

Unlike Cogence partnership, Emerging Leaders do not require the sponsorship of a current program participant or Cogence partner to apply to be a part of the program. Instead, applicants for the program

are accepted each January 1 – February 15 of each year. Selected Emerging Leaders participants will be notified and begin the program on March 1 of the respective year. Declined applications will also be notified by March 1, if applicable.

Selected Emerging Leaders for that Class will be welcomed by the chapter in March. Participants are expected to pay annual dues by March 31 of that year.

PROGRAMS

All Emerging Leaders are invited to Cogence roundtable discussions and other events as a part of their membership dues. Additionally, the Emerging Leaders program hosts leadership development events throughout the year, along with community service projects and other volunteer opportunities. Also, each Emerging Leader is assigned a mentor who has volunteered for the program. Each mentor may be in a similar partner group or functional area, and mentors are asked to meet (virtually or in-person) with their assigned Emerging Leader at least once per quarter throughout the calendar year.

GRADUATING

The Emerging Leaders program is a three-year program for mid-career professionals. At the end of the third year, the graduating leader will be recognized in the fall chapter events and receive a certificate of completion. At this time, the Emerging Leader will work with the Partnership Committee to discuss becoming a Cogence Alliance Partner.



RESOURCES & SUPPORT

Cogence Alliance Chapters are supported strategically by the Cogence Alliance National Board of Directors and administrative staff.

BOARD OF DIRECTORS

The Cogence Alliance National Board of Directors consists of leading executives in the design construction industry from a cross-section of partner groups including owners, architects and engineers, and designers and construction managers. The Cogence National Board advocates for industry-wide collaborative project delivery, including association partnerships, lobbying activities, academic research and/or university partnerships, national event sponsorship and/or participation, and overall outreach to owners across chapter regions.

The Cogence National Board of Directors includes an executive committee, comprised of six individuals: President, Vice President, Secretary, Treasurer, Advocacy Committee Chair, and Programming Chair. Additional seats include all Chapter Presidents and a limited number of at-large seats. Each board member utilizes a three-year term.

ADMINISTRATION

There is a wide variety of support provided from the staff of the Cogence Alliance organization. Dues from each chapter fund the administrative support provided, including, but not limited to:

- **BRANDING & COMMUNICATIONS** (e.g., website, microsites, strategy, national media, newsletters)



- **ORGANIZATION STRATEGY & GROWTH**
(e.g., chapter initiation, advocacy, thought leadership, national events, collaborations/partnerships)

- **TECHNOLOGY INFRASTRUCTURE**
(e.g., filesharing, webinars/ virtual meetings, email, dues processing)

- **CHAPTER RESOURCES**
(e.g., programming templates, processes, other support, Emerging Leaders program)

- **FINANCIAL MANAGEMENT**
(e.g., administration of dues, chapter budget management/ reimbursements, D&O/liability insurance, processing fees)

- **ADMINISTRATIVE SUPPORT**
(e.g., events coordination and management, Board meeting notetaking, other admin. needs)

RESOURCES

Cogence Alliance partners gain access to resources and other deliverables from the thought leadership activities and programs, including program presentations and discussion outcomes. More formalized resources, such as the Cogence GMP or Risk Series, are also available in online and print format for free partner use.

NATIONAL BOARD OF DIRECTORS

** As of January 2023*

JEFF APPELBAUM

Partner, Thompson Hine | Managing Director,
Project Management Consultants

JOANNE BROWN, SECRETARY

Assistant Director of Planning, Design & Construction,
Case Western Reserve University

JOE CLEVES

Partner,
Taft Law

ARMANDO FRANCISCO, TREASURER

Sr. VP of Operations,
Lake Erie Electric, Inc.

WALTER JONES

Senior Vice President, Campus Transformation,
MetroHealth

PHIL KERBER

Division Vice President,
The Whiting-Turner Contracting Co.

PAT KLANAC

Principal,
PTA Engineering

BECKY MCADAMS

VP of OPERATIONS
GPD Group

SEAN MCDERMOTT

Chief Planning and Design Officer,
Cleveland Metroparks

PAM NECKAR, PRESIDENT

CEO,
Impact Project Development

SCOTT WAGNER, VICE PRESIDENT

Vice President,
Regency Construction

PRESIDENT, NORTHEAST OHIO CHAPTER

TADGH O’CROWLEY

Mechanical Engineering Manager,
The Brewer-Garrett Company

PRESIDENT, CENTRAL OHIO CHAPTER

JEFF ORTMAN

President,
HAWA, Incorporated

KEVIN THOMPSON

Executive Director,
Cogence Alliance

CHAPTER LEADERSHIP

** As of January 2023*

NORTHEAST OHIO

BRAD BERKOWITZ

Project Manager,
The Whiting-Turner Contracting Co.

JEFF CERVENY

Sr. Mechanical Engineer,
PTA Engineering

CARTER EDMAN

Manager, Architecture & Site Development,
City of Cleveland

BOB HAGER

Member, Executive Committee,
Brennan Manna Diamond

CYNTHIA LEITSON

Vice President, Capital, Construction
& Supply Management, Tri-C

AARON LOBAS

Director of Facilities,
Osborn Engineering

JEFF LOYALL

Vice President,
Turner Construction

ROSS MITCHELL

Sr Mechanical Estimator,
TH Martin

TADHG O’CROWLEY

Mechanical Engineering Manager,
The Brewer-Garrett Co.

DEAN VAUGHN

VP Construction Services,
UH / Sodexo

BRYAN WAHL

Principal,
Bostwick Design Partnership

CENTRAL OHIO

FRANK EISENHOWER

Principal, Director of Columbus Office,
Karpinski Engineering

KELLY GREENE

Specialty Construction,
DIRTT Environmental Solutions

JEFF ORTMAN

President,
HAWA, Incorporated

DAVID SCOTT

Managing Partner,
Brennan Manna Diamond

DOUG SMITH

Principal,
Veregy

JENNIFER SON

Project Architect,
The Design Group

JONATHAN WILCH

Director of Health Care and Higher Education,
MA Design



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