

## TOP STORIES

- **2011: Moving Forward**  
As we move forward with the first edition of Framework Online for 2011, the **Steel Framing Alliance** (SFA) thanks you for supporting our mission to expand the market for CFS framing in North America. [More](#)
- **CFSEI Chairman's 2011 Outlook**  
I am happy to note that this article will be the start of a continuing presence that **CFSEI** will have in the Framework Online newsletter brought to you by the **Steel Framing Alliance** (SFA). [More](#)
- **Cold-Formed Steel Framing has Set Sail for Annapolis – Have You?**  
Registration is now open for the 2011 Mid-Atlantic Steel Framing Expo and Cold-formed Steel Engineers Institute Conference and Annual Meeting to be held at the Historic Inns in Annapolis, Maryland on May 23-24, 2011. [More](#)
- **2011 CFS Articles for STRUCTURE Magazine – We Need Your Help**  
STRUCTURE Magazine editorial board is looking for articles on successful and unique CFS projects for 2011 – 2012. [More](#)

## MARKETPLACE

- **U.S. Construction To Recover In 2012, Led By Hotels-AIA**  
NEW YORK - U.S. nonresidential construction activity will decline this year but recover in 2012, led by hotel and retail sectors, according to a twice-yearly forecast by an architects' trade group. [More](#)
  - **Architecture Billings Index Continues To Climb**  
Last month's news that the American Institute of Architects' Architectural Billings Index had finally reached the pre-2008, industry meltdown levels was great news, though approached cautiously after the unpleasant and unexpected dip the month before. [More](#)
  - **New-Home Sales Jump In December**  
Sales of new, single-family homes in December rose 17.5% over November to a seasonally adjusted annual rate of 329,000, the U.S. Census Bureau and the Department of Housing and Urban Development reported Wednesday. [More](#)
  - **New Buildings in California Now Required to Be More Efficient**  
New buildings in California must now be more environmentally responsible under provisions of the state's Green Building Standards Code that took effect with the new year. [More](#)
- Multifamily Rentals: NAHB Sees Rising Demand, Insufficient Supply**  
New job creation amid a slowly recovering economy is creating increased demand by new renters seeking to move into apartments. [More](#)

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## UPCOMING EVENTS

**February 17, 2011**  
WEBINAR: Cold-Formed Steel Field Observation And Repair  
3:00 P.M. [More](#)

**May 23-24, 2011**  
MASFA Expo & CFSEI Annual Conference  
Annapolis, MD. [More](#)

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- **Builders Expect Jobs At Hospitals, In Higher Ed**  
OHIO - Hospital and higher-education projects are expected to represent the bright spots in an otherwise flat construction market in Ohio and across the U.S. this year. [More](#)
- **Recovering Economy Will Improve Already Robust Multifamily**  
The economic recovery might be uneven and slower than everyone wants, but it's a comeback nevertheless, and in the near- and mid-term, it will help an already thriving U.S. multifamily market. [More](#)
- **Non-Residential Construction In Canada Continues To Climb**  
Non-residential construction in Canada increased for the third consecutive quarter this year, as BC had a moderate rise and Alberta declined. [More](#)

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### 2011: Moving Forward

As we move forward with the first edition of Framework Online for 2011, the **Steel Framing Alliance (SFA)** thanks you for supporting our mission to expand the market for CFS framing in North America. I also want to discuss changes to our organization and lay out what we plan to accomplish towards the SFA mission in 2011.

Perhaps the most appropriate place to start is with Framework Online itself. Framework has changed its format and frequency over the years as the industry has changed. The kind of information necessary for us to be competitive has also evolved. Beginning with this current issue, the production schedule will shift to four editions annually, with issues delivered to your inbox the first Wednesday of February, June, September, and December. Our focus will turn more toward keeping you updated on research and other SFA activities, although we will also continue to offer important industry news occurring outside of SFA and our membership. This will include a regular and more prominent spot for CFSEI, the technical council of SFA, in each edition. Please feel free to offer comments on the frequency of Framework Online and its content, and to suggest articles you would like to see in future editions of Framework.

Email us your comments at [pr@steelframing.org](mailto:pr@steelframing.org)

On the technology front, the CFS industry still faces significant challenges from competitors and code requirements. At the same time, we see many opportunities in these same areas to improve the competitiveness of CFS framing. Among the activities planned or underway for 2011 are:

- **Conducting a survey of SFA and CFSEI members to identify priority needs for research and technical information.** This survey is conducted every other year. It provides an important opportunity for members to help identify strategic activities for SFA. We also use the results to leverage partnerships with allied organizations that have a shared interest in specific needs identified in the survey.
- **Developing a training program for code officials on inspection of mid-rise load bearing CFS buildings.** In the past several ICC code change cycles, SFA has responded to an increasing number of attempts to increase the inspection requirements on CFS structures by requiring 3<sup>rd</sup> party special inspections, with no substantiation to support such proposals. In response, we plan to develop and deliver training to code officials to educate them on the relative ease of inspecting CFS buildings as part of the traditional code inspection process.
- **Expanding research to develop improved assemblies for thermal performance and energy code compliance.** SFA is currently winding down the first phase of this effort to test conventional assemblies. In the next year, we will initiate a second phase looking at more innovative assemblies that can greatly increase the energy efficiency of steel framed buildings.

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The objectives of the research, being conducted by Oak Ridge National Laboratory, are to position the CFS industry with compliance tools for current energy codes, enable improved calculation procedures, and determine cost effective solutions for the future.

- **Responding to wood industry attempts to move into 5 and 6 story buildings.** Working through the political process rather than the more robust technical processes usually used to modify building codes, the wood industry has successfully gained approval for wood buildings up to 6 stories that historically have been limited to noncombustible construction. This threatens to move into other parts of Canada and into the United States. SFA, working with allies from Canada, will begin a campaign to educate building owners, designers, and insurers on the many benefits of CFS in these buildings, tactfully reminding them of the good reasons for dimensionally stable and noncombustible materials being preferred (and required) in these buildings in the past.
- **Promoting the sustainability of CFS in the market and in codes, standards, and green building programs.** Steel is the only infinitely recyclable building material and it has inherent high recycled content. It is durable, resists moisture induced problems, and is an excellent structural material. SFA will continue to promote these and other attributes of CFS in codes such as the International Green Construction Code (IgCC), National Green Building Standard (NGBS), and in various standards and programs like the United States Green Building Council's (USGBC) LEED.
- **Expanding on a shift initiated over the past few years from a reactive to a proactive codes and standards program.** We have already realized some significant, positive changes in the codes as a result of these efforts the past few years. We will continue to focus on critical issues including energy, structural requirements such as special inspections, and termites. In 2011, we have the opportunity to focus on key states such as Florida, California, Hawaii, and others where we can set good precedents that will be followed by other states.
- **Promoting success stories with CFS including a targeted PR and ad campaign focusing on hotels, condos, apartments, and similar occupancies ripe for CFS growth in the mid-rise market.** Our initial case studies show significant cost savings over heavier construction materials as well as reductions in cycle time on the order of months. We will continue to develop and promote case studies showing these and other advantages such as lower insurance costs, and the benefits of noncombustible, sustainable, and dimensionally stable CFS framing.
- **Focusing our website on the key advantages of CFS.** The materials you have valued over the years will still be readily available on our public and members only websites but will be supplemented with updated information on key issues. The new look will be out in March. Check it out at <http://www.steelframing.org>.
- **Initiating a study on acoustic requirements and future trends.** We continue to see green codes push the limit on sound transmission coefficients and other sound requirements without good rationale to support such actions. SFA will conduct a study of the emerging trends in this area to develop a long term strategic plan for our industry.

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- **Maintaining a strategic position as a delivery vehicle for technical information to improve the competitiveness of CFS.** SFA will continue to maintain our AIA provider status to deliver recognized and credible continuing education programs. It is particularly exciting to see how new technology can aid our efforts in such an efficient way as we have seen with the CFSEI webinar series. Their highly successful webinar series will continue in 2011. Please see the details on opportunities in the letter from Bill Babich, chairman of the CFSEI executive committee, in this issue of Framework Online.
- **Also expect more outreach from CFSEI in 2011 as they expand their activities.** CFSEI is planning the 2011 version of the highly successful Annual Meeting and Expo in May in Annapolis MD. Don't miss this opportunity to increase your knowledge and meet with successful peers from the industry.

In addition to the items above, there will be some minor "behind the scenes" changes in the operations of SFA in 2011. Following our restructuring in 2010 under AISI, we are continuing to streamline our operations to direct as much as our funds toward productive activities directly addressing our mission. One minor change is to the leadership of SFA and CFSEI. Beginning in 2011, the former Board of Directors of both organizations will be renamed executive committees, with their leadership position recast as the chair of each. We see these minor changes as seamless transitions to the new structure. You on the other hand, should not see any difference in the way we otherwise operate. We will continue to give our best efforts to promoting, protecting, and advancing the CFS markets in 2011 and beyond. We look forward to working with many of you as we move forward.

Best regards,

*Mark Nowak, President, The Steel Framing Alliance*

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### CFSEI Chairman's 2011 Outlook

I am happy to note that this article will be the start of a continuing presence that **CFSEI** will have in the Framework Online newsletter brought to you by the **Steel Framing Alliance** (SFA). The CFSEI is the technical council of SFA and is responsible for enabling architects, engineers, and other design professionals to utilize cold-formed steel (CFS) in their structures.

2010 proved to be a challenging year for everyone associated with the construction industry. From what I have heard and read, 2011 should be a bit better and will serve as the start for our recovery as an industry. I would like to take a minute of your time with this article to briefly outline what is in store for CFSEI as we move into 2011.

CFSEI, as the technical council of the SFA, serves the design professional community by promoting the use of CFS framing as well as educating these individuals on proper and efficient design techniques. Our mission is, "To enable and encourage the efficient design of safe and cost effective cold-formed steel framed structures" and our vision is to be recognized as the preeminent worldwide technical resource for cold-formed steel framing design. We accomplish our mission in a variety of ways that are readily available to our membership.

Our vast Technical Note library has always been the focus of our efforts. These design aids are written by design professionals, for design professionals, and that is why they should be an essential part of your CFS library. All of our Technical Notes can be found on our website ([www.cfsei.org](http://www.cfsei.org)) in the "Members Only" section and are available as free downloads. As a member, you have recently received several Technical Notes via email. In the coming months we will be rolling out several new Technical Notes that deal with subjects such as: steel roof deck diaphragm design when attached to CFS members, direct strength elastic buckling values, proper CFS specifications, design of truss-to-bearing connections, bridging and bridging anchorage, and design of clip angles used in CFS construction. All of these Technical Notes offer real world solutions to current design/specification issues that are encountered every day.

In 2010, CFSEI introduced a series of webinars to more effectively accomplish our mission. The webinar format has been well received by our membership and we plan on a robust schedule for 2011 with 8 webinars. Each webinar offers a real-time opportunity for learning from some of the best CFS professionals in the country on the issues of the day. Our next webinar is scheduled for Thursday, February 17, 2011 at 3:00 pm EST. Mitch Hughes, President of DSI Engineering, LLC will speak about CFS Field Observations. Mitch, who is also the President of the Atlanta/Southeast Chapter of CFSEI, is well positioned to deliver this webinar due to his extensive background in designing CFS structures. You won't want to miss this one.

To take this media to the next step, CFSEI is in the process of making previous webinars available on our website. If you missed any of our webinars last year, stay tuned for information about how you can access them. All of these webinars offer an excellent opportunity to receive Continuing Education credits.

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As a way to reach more of our members about local issues, the CFSEI runs several local Chapters around the country. We have the Florida Chapter, the Atlanta/Southeast Chapter, the West Chapter and are affiliated with the local presence in Hawaii. This gives our members an opportunity to learn and network with the local design professionals about the issues important to them. These chapters are managed by local professionals that are aware of the CFS framing issues specific to the area. To learn more about these local chapters and their activities, please visit <http://www.cfsei.org>.

As a way to meet our members and provide an excellent resource for networking and education, CFSEI hosts an Annual Meeting every spring. Our 2010 event, held in Atlanta, was a resounding success and we are expecting the same for our 2011 event. It is scheduled to be held on May 23-24, 2011, in Annapolis, Maryland at the Historic Inns, in conjunction with the Mid-Atlantic Steel Framing Alliance Expo, and will deliver more than 16 hours of educational programming for architects, building inspectors, contractors and engineers. Plus, there will be an expo featuring the latest tools and resources. Seasoned veterans in the industry, as well as those just exploring steel's capabilities, will want to attend. An announcement of a CFS Design Award competition will be made at the show, so now is the time to begin thinking about unique projects that you may want to enter. I hope to see all of you there.

In closing, I would like to take this opportunity to invite you to renew your CFSEI memberships for 2011 and to join one of our local chapters. This is easily accomplished by going to [www.cfsei.org](http://www.cfsei.org) or [www.steelframing.org](http://www.steelframing.org) and hitting the "2011 Renew Online" link. If you already have renewed for 2011 I want to thank you for your support. If you have not yet renewed please take notice to all of the benefits I have outlined in this article and log on today and renew. If you have never been a member of CFSEI, I want to invite you to become a member and enjoy all the benefits and the good things that are happening in 2011. As an organization whose main goal it is to educate our members about CFS framing, I want to extend an invitation to each of you to contact me and share with me what we can do to better serve our membership. My email is [bbabich@trussteel.com](mailto:bbabich@trussteel.com).

Here is to a good year for all of us!!!

*Bill Babich, P.E., CFSEI Chairman*

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With more than 16 hours of educational programming and an expo featuring the latest tools and resources - seasoned veterans in the industry along with those just exploring steel's capabilities should plan to attend.

This combined venue offers exceptional opportunities for participants and sponsors to explore all that steel framing has to offer and engage design professionals, contractors, developers, code officials and with others involved in the world of construction. A special Contractor's Day has been scheduled for the first day of the conference with sessions covering the most current trends in the field of cold-formed steel framing.

Other highlights of the conference include:

- 16 Continuing Education Sessions
- Nationally Recognized Speakers
- Trade Show Expo of latest technologies for Cold-Formed Steel Framing
- Dinner Cruise on the Chesapeake Bay

The conference will take place in the Historic Inns, Governor Calvert House, one of the oldest buildings in Annapolis surrounded by a rich history dating back to the 1700's, and directly across the street from the current Maryland State House. The area affords guests the opportunity to experience the rich history of the past while enjoying the many attractions of today including a vibrant shopping and entertainment district and the beautiful Chesapeake Bay known as the Sailing Capitol of America.

To learn more about the conference, register as an attendee or sponsor [click here](#).

For additional information about the conference, contact 1-800-79-STEEL.

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**2011-2012 CFS Articles for STRUCTURE Magazine – We Need Your Help**

STRUCTURE Magazine editorial board is looking for articles on successful and unique CFS projects for 2011. As listed in the STRUCTURE Magazine [Editorial Calendar](#), the August 2011 issue will contain some feature stories on structures built with cold-formed steel (CFS) framing. If you or your firm have been involved in a story where CFS framing have played a positive role, consider submitting an article. We can help you draft your story. Please contact Don Allen, CFSEI Technical Director ([dallen@cfsei.org](mailto:dallen@cfsei.org)) with a brief description of your project.

Note that although the August issue focuses on steel, every month STRUCTURE Magazine has articles on different aspects of construction that may include CFS framing or accessories specified by structural engineers.

If you have something you would like to submit directly to the Editorial Board, feel free to forward it to Roger LaBoube ([laboube@mst.edu](mailto:laboube@mst.edu)) at the CFSEI-sponsored Wei-Wen Yu Center for Cold-Formed Steel Structures (CCFSS).

For submittal forms and an author's handbook with tips on writing a world-class article, visit the [STRUCTURE Magazine](#) website.

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**MARKETPLACE****U.S. Construction To Recover In 2012, Led By Hotels-AIA**

NEW YORK - U.S. nonresidential construction activity will decline this year but recover in 2012, led by hotel and retail sectors, according to a twice-yearly forecast by an architects' trade group.

Overall nonresidential construction spending is expected to fall by 2 percent this year before rising by 5 percent in 2012, adjusted for inflation, the American Institute of Architects (AIA) said on Wednesday.

The projected decline marks a deteriorating outlook compared to the prior survey in July 2010, when a 2011 recovery was expected.

That recovery has been pushed back by historically low lending rates for real estate projects, lingering effects of overbuilding and an unfavorable bond market that has limited municipalities' access to funding, the AIA said.

Potential higher borrowing costs and rising energy prices are areas of concern for the architecture and construction industry, said AIA chief economist Kermit Baker.

Construction of industrial space is seen falling 11.8 percent this year, with smaller declines projected for office buildings, hotels and retail space. Spending is seen lower both this year and next on public safety infrastructure, but is expected to be up slightly in areas like healthcare, religious and recreational facilities.

The consensus forecast counts predictions from McGraw Hill Construction, IHS-Global Insight, Moody's economy.com, and others.

The AIA's monthly billings index, a leading indicator of activity because it measures work architects have performed, last month reached its best level since November 2007 and has pointed to increasing demand for design services for two consecutive months.

The billings index is considered an indicator of construction activity nine to 12 months in the future, and is tracked by companies that generate sales from the sector.

Most diversified industrial companies get at least some revenue from nonresidential construction, including Honeywell International Inc, Tyco International Ltd, Johnson Controls, and Caterpillar Inc.

European companies like Philips, Siemens, Schneider Electric and lock maker Assa Abloy also participate in the sector.

Source: Reuters, January 26, 2011

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## MARKET PLACE

### Architecture Billings Index Continues To Climb

Last month's news that the American Institute of Architects' Architectural Billings Index had finally reached the pre-2008, industry meltdown levels was great news, though approached cautiously after the unpleasant and unexpected dip the month before. That celebratory caution seemed definitely warranted at that time, and will likely continue to be the case in the foreseeable future, even with this month's news that the Index has continued to rise. Jumping up more than two whole points to 54.2 (anything above 50 indicates an increase in billings and averaged growth within the industry), it shows that perhaps things might be getting better for the business of building. That the increase continued to hold in December makes it an even better sign, explains the AIA's official decipherer of such things:

"This is more promising news that the design and construction industry is continuing to move toward a recovery," said AIA Chief Economist, Kermit Baker, PhD, Hon. AIA. However, historically December is the most unpredictable month from a business standpoint, and therefore the most difficult month from which to interpret a trend. The coming quarter will give us a much better sense of the strength of the apparent upturn in design activity. "

For further reading, we highly recommend checking out Matthew Lynch's "Industry Outlook 2011" for Architect, which gives a great, detailed overview of what the Billings Index will tell you and how this year is likely to pan out for the industry.

Source: *Media Bistro, January 20, 2011*

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## MARKET PLACE

### New-Home Sales Jump In December

Sales of new, single-family homes in December rose 17.5% over November to a seasonally adjusted annual rate of 329,000, the U.S. Census Bureau and the Department of Housing and Urban Development reported Wednesday. Even with the jump, however, sales remained 7.6% below the level of December, 2009.

The gain handily beat the Wall Street estimate of sales of 300,000 homes.

The median and average prices also rose significantly, with the median jumping 12% to \$241,500 from \$215,500 in November and \$222,600 in December, 2009 and the average price rising to \$291,400 from \$284,000 in November and \$278,300 a year earlier.

Inventory fell 17.9% to a 6.9-month supply at the current sales rate from 8.4 months in November and 7.8 months in December, 2009.

An estimated 321,000 new homes were sold in 2010, 14.2% below the 2009 figure of 375,000, the fifth consecutive year of decline and the lowest level of new single-family home sales on records going back 47 years. A normal market, considered healthy by analysts, would be marked by sales of 600,000 new single-family homes annually.

The national gain was driven primarily by the West region, where sales soared 71.9% from November to 110,000 homes on a seasonally adjusted basis. That was 32.5% ahead of December of 2009. Not seasonally adjusted, an estimated 7,000 homes were sold in the West during the month, up from 4,000 in November.

The South, the largest region by share of sales, was up only 1.8% from November to a seasonally adjusted annual rate of 168,000 sales, 8.7% behind the previous December. Not seasonally adjusted, an estimated 12,000 homes were sold in the South in December, essentially flat with November.

The Midwest was up 3.2% to a rate of 32,000 homes, off 37.3% from December, 2009. Not seasonally adjusted, sales were flat at 2,000 homes.

The Northeast was down 5% to a rate of 19,000 homes, 50% below December the year prior. Only 1,000 homes were estimated to have been sold, the same as November.

Roughly half the homes actually sold were priced between \$150,000 and 299,999.

Analysts had mixed views of the data. Michael Rehaut at J.P. Morgan wrote to investors, "Overall, we view these data points as encouraging, as we note that December existing homes for sale also rose 12%, which supports, in our view, our outlook for stable to slightly improving housing demand."

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David Goldberg at UBS put out a note urging caution in reading the data. "Although this suggests a reason for optimism, we're skeptical," he wrote. "Specifically, we note: 1) sales were 7.6% below '09 levels; 2) year-end is a seasonally slow time for housing; in turn, annualizing the monthly data may overinflate small changes; and 3) the majority of the increase was in the West +71.9% seq. Further, though it's hard to prove empirically, we're concerned that rising mortgage rates/tightening underwriting may be pulling forward demand."

Source: *Big Builder*, January 26, 2011

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## MARKET PLACE

### New Buildings in California Now Required to Be More Efficient

New buildings in California must now be more environmentally responsible under provisions of the state's Green Building Standards Code that took effect with the new year.

CALGreen is the first statewide green building code in the country and contains voluntary as well as mandatory provisions. The required measures set a threshold for green building in the state and the voluntary portions provide parameters for higher standards of green building. The rules are the latest version of California building code provisions that began as entirely voluntary measures. Adopted in 2008, the provisions took effect in 2009 with a timetable to convert the baseline standards to mandatory measures.

"One of the big benefits of the new building code provisions is that they make the whole subject of green building much more accessible," said attorney Jennifer Hernandez, who co-chairs the environmental team at Holland & Knight in addition to leading the law firm's West Coast land use and environment practice group.

Third-party programs, like the U.S. Green Building Council's Leadership in Energy and Environmental Design standards and rating system, "while terrific ... require a fair amount of assistance (to undergo their process)," Hernandez said, adding that such aspirational programs are "completely appropriate for emerging approaches and technologies."

"Third-party systems facilitate innovation," she said. "With the new building code, what's great is that the floor is now raised for everyone. A building code is a much more robust tool for driving widespread shifts in practices."

If CALGreen does not have a detrimental effect on building rates or costs, "look to other states and municipalities to follow" California's lead, wrote attorney Shari Shapiro in her Green Building Law Blog.

CALGreen requires new buildings to be more energy efficient, use less water and emit fewer pollutants. Among other things, the standards:

- Set a threshold of a 20 percent reduction in indoor water use and voluntary goals for reductions of 30 percent, 35 percent and 40 percent.
- Require separate meters for indoor and outdoor water use at nonresidential buildings; and at those sites, irrigation systems for larger landscaped areas must be moisture-sensing.
- Call for 50 percent of construction waste to be diverted from the landfills and list higher, voluntary diversion amounts of 65 percent to 75 percent for new homes, and 80 percent for commercial construction

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- Mandate inspections of energy systems -- such as heating, air conditioning and mechanical equipment -- for nonresidential buildings that are larger than 10,000 square feet to "ensure that all are working at their maximum capacity according to design efficiencies."
- Require that paint, carpet, vinyl flooring, particle board and other interior finish materials be low-emitting in terms of pollutants.

A year ago, after the California Building Standards Commission unanimously adopted the code revisions that took effect on January 1 this year, then-Governor Arnold Schwarzenegger said, "The code will help us meet our goals of curbing global warming and achieving 33 percent renewable energy by 2020 and promotes the development of more sustainable communities by reducing greenhouse gas emissions and improving energy efficiency in every new home, office building or public structure."

*Will CALGreen have an effect on LEED?*

California's landmark climate legislation, AB 32, calls for the state to reduce greenhouse gas emissions to 1990 levels by 2020. AB 32 was signed into law by Schwarzenegger in 2006 and withstood a challenge in the polls last November. The mandatory provisions of CALGreen are expected to boost efforts to achieve the goal by reducing greenhouse gas emissions by 3 million metric tons of CO2 equivalent, the California Air Resources Board estimates.

"People have been using building codes for many decades and they have been upgraded over the years," said Hernandez. She noted changes that have raised standards in numerous areas and recalled that one of the more contentious issues in recent memory was the requirement for fire sprinklers.

"The truth is that building codes are comfortable mandates and I think they (the mandatory provisions set by CALGreen) will be widely adopted without a lot of push back from the development community," Hernandez said. "I really think the message for developers and builders at this point is the mandates are both practical and fully enforceable."

CALGreen was more than three years in the making. The building commission conferred with several state agencies as well as industry groups, environmentalists, green building organizations, architects, local and regional officials and other stakeholders. At various points, the discussion became heated and in the later stages of the talks, some of the strongest push back came from green groups including the Northern California Chapter of the U.S. Green Building Council, Build It Green, Global Green, the Natural Resources Defense Council, Environmental Defense Fund and Sierra Club California. While they praised several provisions in the code, the organizations were concerned that the measures create a "quasi rating system," which - though voluntary -- could cause confusion in the marketplace and undermine stricter green building ordinances adopted by cities.

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The state, which requires its new facilities and renovations involving 10,000 square feet or more to attain at least a LEED-Silver rating, disputed the criticism.

In her post, Shapiro said California will serve as a living laboratory to see what effect, if any, a green building code can have on LEED. She wrote:

"An interesting question that has been bandied about is what a green construction code will do to LEED. California will be an interesting laboratory. Will developers still seek LEED certification for their buildings when all new construction must be green? How sensitive is the customer base to green vs. more green?"

Source: Reuters, January 4, 2011

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**MARKET PLACE****Multifamily Rentals: NAHB Sees Rising Demand, Insufficient Supply**

New job creation amid a slowly recovering economy is creating increased demand by new renters seeking to move into apartments. However, the lack of credit needed to finance the development of apartments is already causing rents to increase and is likely to lead to a shortage of available apartments in the next few years.

“Although we are forecasting construction of 133,000 new multifamily residences in 2011,” said the National Association of Home Builders’ chief economist, David Crowe, “that is far short of the 250,000 to 300,000 units that would be required to keep supply and demand in balance. In addition, we have yet to make up for the insufficient number of new apartments that should have been built over the last two years. The capital needed to finance that construction is just not available to apartment developers.”

Multifamily developer Bill McLaughlin, an executive vice president of the Avalon Bay Company, a real estate investment trust headquartered in Washington, D.C., said he sees demand for apartments increasing, but notes that the cutback in multifamily development in 2009 and 2010 has resulted in a “woefully inadequate supply” of new multifamily rentals to meet the rising demand.

Private development firms bore the brunt of the constrained supply of capital. Jay Jacobson, national partner for acquisition and investment for Wood Partners, Boca Raton, Fla., said “The market is telling firms to build and acquire, but capital is still extremely difficult to find.”

Even affordable rental housing is feeling the pressure. Robert Greer is president of Michaels Development Company, Marlton, N.J., a company that develops and manages affordable rental communities throughout the country. According to Greer, “Affordable housing, which is primarily driven by the Low-Income Housing Tax Credit program, is rebounding. Investors are slowly coming back into the market, and deals are getting done...which is good news. But the bad news is that given the depth of the current recession, more people than ever need affordable housing, and the demand far outstrips the supply.”

Source: NAHB, January 13, 2011

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## MARKET PLACE

### Builders Expect Jobs At Hospitals, In Higher Ed

OHIO - Hospital and higher-education projects are expected to represent the bright spots in an otherwise flat construction market in Ohio and across the U.S. this year.

That's the outlook of construction executives surveyed by the Associated General Contractors of America.

In Ohio, 58 percent said they expect more medical and college-backed building projects this year than last. That's in contrast to the 32 percent who offered the same outlook nationally, although the national expectations still outpaced predicted work in most categories.

Data were not broken out by city, but Columbus projects appear to be in line with that expected trend. Local construction executives point to projects such as the Nationwide Children's Hospital expansion and work at Ohio State University as drivers of construction work here.

"We've been so beaten down, any upward trend at all is a positive," said Richard J. Hobbs, executive vice president of the Central Ohio chapter of the Associated General Contractors.

Hospital and higher education were the only categories expected by a majority of respondents to generate more work this year. A third of Ohio construction executives said they expect more water and sewer work this year, while just under 30 percent predict more utility and public-building work.

Hobbs said that the publicly financed Hilton hotel being built across from the Greater Columbus Convention Center marks the first time in years that "we've had tower cranes in Downtown Columbus."

But almost no one in the Ohio construction industry expects there to be more work on retail, warehouse or private office space this year.

President Barack Obama is expected to call for more spending on transportation infrastructure, such as highways and bridges, in tonight's State of the Union address. That is encouraging news, said Stephen Sandherr, CEO of the Associated General Contractors of America.

Only 14 percent of survey respondents nationally, though, said they expect more spending this year on such projects.

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As for substantial construction growth, most think that's at least another year or two away. Just 13 percent of Ohio respondents and 16 percent of respondents nationwide expect the market to grow this year. Nearly half said they expect growth next year, though more than one-third said it would be 2013 or 2014 before business takes off again.

Still, 31 percent of Ohio firms said they expect to add workers this year. Nearly half, 45 percent, said they laid off workers in 2010.

Source: *The Columbus Dispatch*, January 25, 2011

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## MARKET PLACE

### Recovering Economy Will Improve Already Robust Multifamily

The economic recovery might be uneven and slower than everyone wants, but it's a comeback nevertheless, and in the near- and mid-term, it will help an already thriving U.S. multifamily market. That's the conclusion of Jubeen Vaghefi, managing director and leader of Jones Lang LaSalle's national multifamily investment sales practice, who spoke with *MHN* on Friday, even as JLL CEO Colin Dyer attended the World Economic Forum Annual Meeting 2011 in Davos, Switzerland, to speak about broader commercial real estate trends, which Dyer asserted are generally stronger than last year.

The relative health of the multifamily industry is well known, but the question now is how a broader recovery will affect it. For-sale housing has often been the main residential beneficiary after previous recessions, as people look to buy. But things aren't quite the same this time around, says Vaghefi.

"We're now getting to the point in the recovery at which people are starting to spend again, and are more bullish about where the economy is headed," Vaghefi tells *MHN*. "At the same time, one of the legacies of the recession is a pent-up demand for living space, because people were doubling up or living with relatives. Now people are beginning to feel more confident about forming their own households."

But not as many of them will be in the market for for-sale housing as after previous recessions, he says, because there's been a shift in mindsets. "There's a diminished desire to own a home in a lot of markets," Vaghefi says. "Homeownership has lost a lot of its luster."

Combine that with a dearth of new multifamily properties coming on line, and there will be continued upward pressure on multifamily occupancies and rental rates. "It's relatively simple arithmetic," Vaghefi continues. "Fixed supply for the time being and increased demand. The bottom line is that NOIs are starting to improve substantially."

Will improved prospects for multifamily drive a new gold rush of development for the property type? Vaghefi doesn't think so. "There's a lot of talk about new development, particularly in primary markets," he says. "But lenders are being very disciplined."

Also, Vaghefi notes, "a lot of players formerly in the development business don't have the balance sheet they once had, which restricts their ability to borrow money. That isn't to say that they won't be back in a few years' time, but right now not everyone who wants to develop can borrow. Development will come back, but it will be at a measured pace."

Source: *Multi-family Housing*, January 28, 2011

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## MARKET PLACE

### Non-Residential Construction In Canada Continues To Climb

Non-residential construction in Canada increased for the third consecutive quarter this year, as BC had a moderate rise and Alberta declined.

Statistics Canada released a report recently that said investment in non-residential building construction in Canada increased by 2.0 per cent to \$10.5 billion in the fourth quarter of 2010, compared to the third quarter.

“It was the third consecutive quarterly increase and largely reflected higher spending on commercial building construction,” said the report.

Total non-residential building construction in B.C. increased by 2.4 per cent to \$1.138 billion. The rise was the result of a jump in commercial construction (4.7 per cent) to \$680 million and industrial construction, which increased by 2.0 per cent to \$69 million. Institutional construction dropped by 1.3 per cent to \$389 billion.

In Metro Vancouver, total non-residential investment spending increased 7.2 per cent to \$615.4 million in the fourth quarter of this year.

“Total non-residential building construction investment spending increased for the second consecutive quarter,” said Keith Sashaw, president of the Vancouver Regional Construction Association. “These quarterly gains could signal that the worst is over and that spending may trend higher in 2011.”

The rise was led by commercial building construction, which jumped 6.7 per cent to \$427.9 million.

Industrial building construction investment increased 7.2 per cent and institutional-government building investment rose 8.2 per cent during the same period.

“Despite these gains, total non-residential construction remained comparable to 2005 spending levels,” said Sashaw.

“At this point it is too early to conclude that a turning point has occurred and investment spending is headed higher on a sustained basis.”

In B.C., total non-residential building construction decreased by 2.3 per cent when compared to the fourth quarter in 2009.

Total non-residential investment spending in Metro Vancouver is down 15.8 per cent to \$2.34 billion year-to-date in 2010.

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Total non-residential building construction in Alberta fell by 1.8 per cent to \$2.165 billion. The decline was driven by the institutional component, which fell by 9 per cent to \$700 million. Industrial construction increased by 0.9 per cent to \$237 million and commercial construction increased by 2.4 per cent to \$1.228 billion.

Source: *Journal of Commerce*, January 26, 2011

## HEADQUARTERS

**Steel Framing Alliance**  
1140 Connecticut Avenue  
Suite 705  
Washington, DC 20036  
Tel: 202.785.2022  
Fax: 202.785.3856

**REMINDER**  
**HAVE YOU PAID YOUR**  
**2011 DUES?**  
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## NEW MEMBERS

- Armour Unsderfer Engineering Inc, PS Bellevue, WA
- BakerRisk San Antonio, TX
- Devlen Engineering Inc Lake Mary, FL
- Deyo Construction Salem, NH
- Fink Robert's & Petrie, Inc. Indianapolis, IN
- HDR Architecture Pasadena, CA
- Novatek Provo, UT
- Rosanwo & Assoc. Atlanta, GA
- Three Oaks Constr., Inc. Shingle Springs, CA
- Wekando Construction San Juan, PR

## UPCOMING EVENTS

**February 17, 2011**  
WEBINAR: Cold-Formed Steel Field Observation And Repair 3:00 P.M. [More](#)

**May 23-24, 2011**  
MASFA Expo & CFSEI Annual Conference Annapolis, MD. [More](#)

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