Winter 2014 - 2015

Seattle Chapter, Society for Design Administration

Excellence in Design Firm Management SDA

Portico

There is nothing in the world more beautiful than the forest clothed to its very hollows in snow. It is the still ecstasy of nature, wherein every spray, every blade of grass, every spire of reed, every intricacy of twig, is clad with radiance.

William Sharp

In This Edition:

Focus on Project Administration

The content of this edition of Portico focuses on Project Administration and includes articles on what your Project Managers need from you and techniques to control clutter on your desk and inbox.

We are pleased to bring back the Member Spotlight feature, and showcase two new members on pages 6 and 9.

Also included throughout this edition are our usual Tech Transfer, Sound Bites, and Quick Tips features.

What Your Executive Needs From You

by Julie Perrine, CAP-OM, MBTI Certified

Editors Note: Though this article was written from the perspective of an executive and her admin, I believe it is equally relevant for project managers (especially those new to management) and assistants.

Have you ever heard an executive raving about his or her assistant and wondered what that admin does that garners such praise? Would you like to be that admin? As an administrative professional turned entrepreneur, my perspective has shifted from how to become the admin my executives couldn't live without to finding admins I can trust and rely on completely. It has been an eye opening journey that has led me to some important insights I want to share so you can become the admin your executives rave about, too.

Let me share a little background first. Throughout my administrative career, I've supported supervisors, managers, vice presidents, and presidents in companies with 5 employees up to 2,500. Some had previous experience in working with an administrative professional, others didn't. There were challenges associated with both.

The executives who were used to outstanding administrative support were typically the easiest for me, as long as they didn't expect me to be exactly like the person who had been supporting them before I arrived. The executives who had never had an admin – or worse yet, had a bad admin – were typically the most challenging. But with a careful assessment of each situation, listening for clues, watching for opportunities, and learning as much as I could about their previous experiences and their current expectations, I was almost always able to win them over.

I felt an enormous sense of accomplishment and undeniable pride in my profession when I converted an executive over to thinking they couldn't do their job as effectively without my support. To get them to this point, it was my job to continually train and educate them over time on the immense value a super competent, value added, actively engaged administrative professional could add to their life. Now the tables have turned, and I've become the executive. I have started building a team of my own. I can tell you it's the most amazing experience of my professional career. It's not that I can't do for myself the things they are assisting me with, it's the simple fact that there are 100s of things that need to be done every week. I only have so much time. They only have so much time. So we divide and conquer. I need their help to keep me on track and fill in the gaps as we move forward.

In some cases, they are much better at or have more training on the given assignment, so they are much more efficient than I could ever hope to be. As a result, I am learning to delegate as many things as I can to my team. This has required patience from my team as I learn to adapt to having administrative support and utilizing their skills and talents wisely. Your executive is likely in a similar place no matter how long they've had administrative support.

Now, I'd like to share what I need and expect from my administrative team as they support me in my executive role. Most likely, it's what your executive needs and expects from you, too.

- I need my team to politely remind, nudge, and occasionally nag me to follow up on some things. It's just the nature of the beast.
- I need my team to tell me when they see me doing something that they could be doing for me instead. They train me to delegate.
- I need my team to send me information and resources they find related to the projects we're working on. This can be key to the decisions we are making.
- I need my team to identify new technologies or systems that we should look at to make our projects and business run more smoothly.
- I need my team to fast track my learning curve by sharing what they've learned about various software, social media, or technology based tools. This helps me and the rest of the team stay current.
- I need my team to point out when they see

Continued on Page 7

President's Message

By the time you receive this issue of Portico, you'll be on the countdown to 2015. I hope you had a wonderful Thanksgiving holiday, and I hope you carve out more relaxation time to spend with your family and dear friends before ringing in the New Year. One of those relaxing times should be with your SDA friends on the evening of December 10 at the Crowne Plaza hotel. It's our annual holiday social, and we are also paying tribute to two chapter members who have recently retired—Susan Vestal and Tena Martins. In addition, we are collecting for those in need—please bring a donation of new socks and new gloves when you join us on December 10. The men, women and children that get help from the Seattle Union Gospel Mission will greatly appreciate your generosity. I look forward to seeing you there.

Have you checked out the blog posts on our chapter website? Some of our posts have been #tbt (throwback Thursdays); it's interesting to look back at SDA over the years. This is from the post titled "It was 55 years ago this week:"

> *Chapter colors were blue and white (blueprint) and its motto was amiability, sincerity and assiduity.*

While I understood their mention of blueprint, I had to look up the meaning of assiduity. When I found out it meant the same as diligence, care, and attention, I got it.

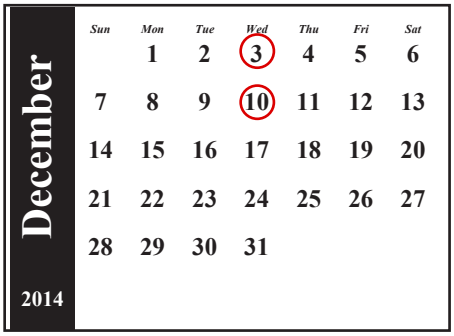
Things have changed in the 55 years since the organization first began—there have been a number of name changes, and SDA chapter colors are no longer blueprint-coordinated. But, I think our Seattle chapter still exhibits assiduity. We are being diligent in providing alternate delivery methods for our educational programs—during breakfast versus during dinner, and webinars at your desk. We are paying attention to your feedback in the surveys we've sent to date. And we care about you, taking the time to call you or drop you a line when you missed one of chapter events.

This year has been a productive year for the Seattle Chapter SDA. Many thanks . . . to those of you who believe in the power of professional organizations. To those of you who are not afraid to take a risk. To those of you who welcome new possibilities. To those of you whose overall mindset is, "Hey, let's try that." Thank you for embracing and supporting the changes the Seattle chapter made this year.

Have a safe and relaxing New Year holiday.

Until next time,

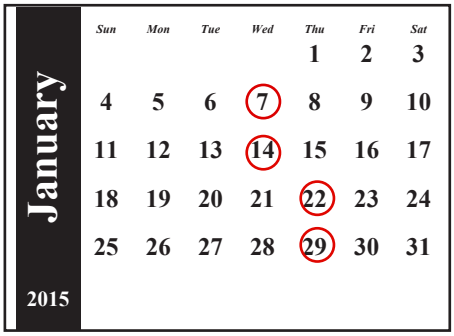
Judy Beebe, CDFA



December 3, 5:30 - 7:00: Board of Directors Meeting at Parsons-Brinckerhoff.

December 10, 5:30 - 8:00: SDA Seattle Holiday Celebration sponsored by Berger Partnership. Crowne Plaza Hotel, Seattle. See sda-seattle.org for more details.

THERE IS STILL TIME TO RSVP FOR THE HOLIDAY EVENT AT SDA-SEATTLE.ORG! PLEASE JOIN US AS WE CELEBRATE THE SEASON AND SDA MEMBERS SUSI VESTAL AND TENA MARTINS!

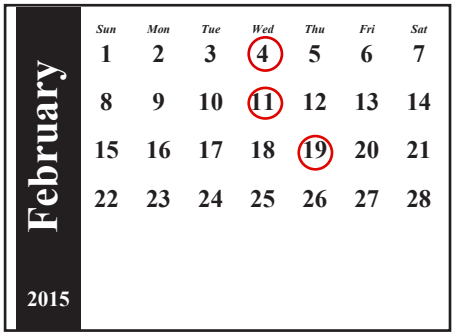


January 7, 5:30 - 7:00: Board of Directors Meeting at Parsons Brinckerhoff.

January 14, 12:00 - 1:00: Webinar: Anatomy of an Interview. See sda-seattle.org for more details.

January 22, 5:30 - 8:30: Business Practice Dinner: Accounting. Crowne Plaza Hotel, Seattle. See sda-seattle.org for more details.

January 29, 2:00 - 3:00: Webinar: Understanding the Hidden Risks When Employees Drive Personal Vehicles. See sdanational.org for more details.



February 4, 5:30 - 7:00: Board of Directors Meeting at Parsons Brinckerhoff.

February 11, 2:00 - 1:00: Business Practice Roundtable: Effective Delegation. See sda-seattle.org for more details.

February 19, 5:30 - 8:30: Business Practice Dinner: The Charrette Process. Crowne Plaza Hotel, Seattle. See sda-seattle.org for more details.

Best Practices: File Naming & Tracking Changes

Be consistent:

- Have conventions for naming your directory structure, folder names, and file names
- Always include the same information (e.g., date and time)
- Retain the order of information (e.g., YYYYMMDD, not MMDDYYYY)

Be descriptive so others can understand your meaning. Within reason, include relevant information such as:

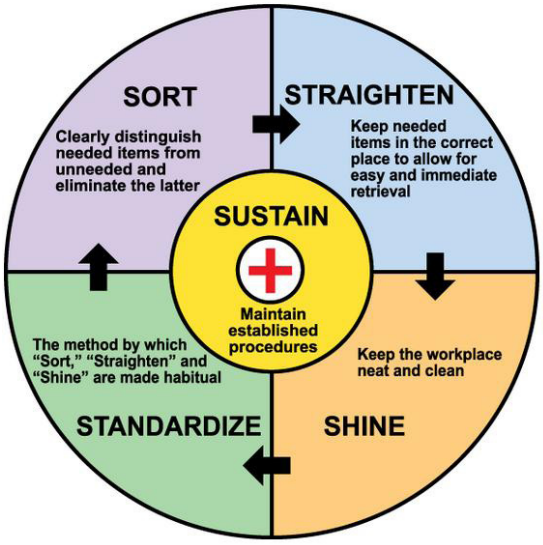
- Unique identifier (i.e., project name or number in folder name)
- Date
- Type of Document *Example: 14-153_112814_Meeting Minutes.doc*
- No special characters: &,*%#:()!@$^~{}[]?<>`
- When using sequential numbering, be sure to use leading zeros to allow for multi-digit versions. For example, a sequence of 1 – 10 should be numbered 01-10.
- Use only one period before the file extension.

Keep track of versions of files.

- Use a sequential numbered system: v01, v02
- Don't use confusing labels, such as "revision," "final," "final2," etc.

Conquer Clutter the 5S Way

5S is the name of a workplace organization method based on five Japanese words that when transliterated into English all start with the letter S. Developed to improve efficiency, minimize waste and improve safety in manufacturing, the methodology is being widely applied as many industries implement lean delivery systems. The 5S approach teaches you to sort, set in order, shine, standardize, and sustain your files, resources and information either on your desk, the office, or online.



The five steps can be summarized as follows:

- "Seiri" or Sort: All unneeded tools, supplies and resources are removed from your workspace. For example, files and records from completed projects should be purged and archived, and outdated procedures and references should be disposed of. Sorting counteracts the tendency to keep things because you might refer to them someday. It also gains valuable workstation space and improves your ability to find things.
- "Seiton" or Straighten: "A place for everything and everything in its place." Straightening creates a system of arranging your workspace, filing system, and computer directories for the most efficient and effective retrieval of information.
- "Seiso" or Shine: Subject your workspace to a thorough initial cleaning and daily follow-up cleaning.
- "Seiketsu" or Standardize: Once the first three S have been implemented, set them as a standard to maintain these practices. Without this fourth step, your workspace is likely to fall back into its previous condition.
- "Shitsuke" or Sustain: Practice 5S as a habit and continually improve on your process.

Sound Bites

"Progress is impossible without change, and those who cannot change their minds cannot change anything."

~ George Bernard Shaw

Technology Transfer: Buttons for Your Macros

If you have created a bunch of macros and added them to your Quick Access toolbar (Word or Excel, etc.), then by default, the icon for those macros looks like this: 

So how do you know which macro is which? You can mouse-point to each one to show the macro name. Or, you can get fancy and assign each macro its own button. Here's how to get fancy.

1. On your Quick Access toolbar, click the drop-down arrow. Select More Commands.
2. Under Choose commands from, select Macros.
3. On the right-hand side, find the macro you want and select it, then click Modify (Figure 1).

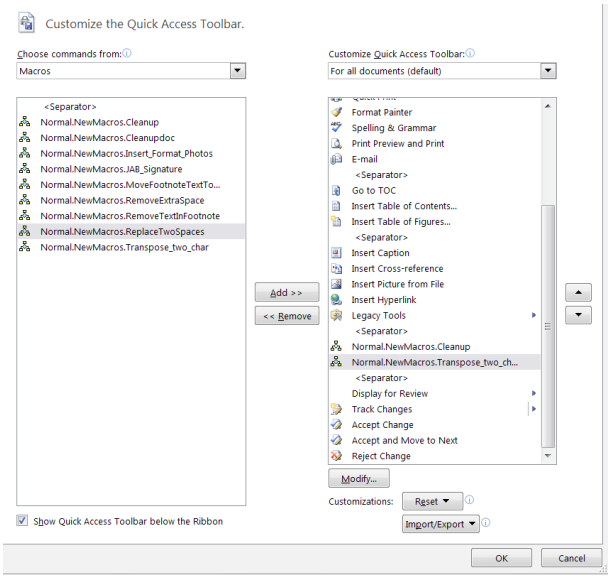


Figure 1

4. The Modify button window opens (Figure 2).

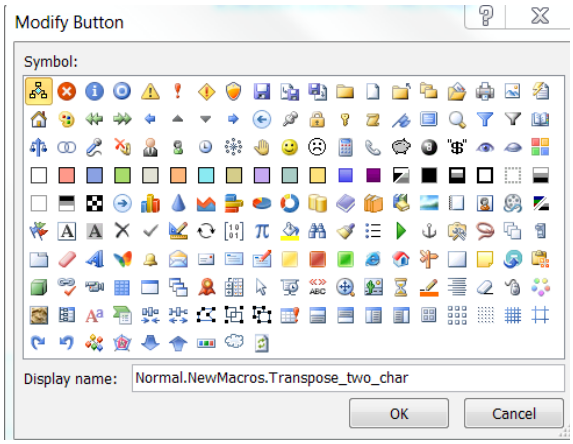


Figure 2

5. Find the button you want and select it. Click OK. Then click OK again.

The fancy button you assigned to the macro should now be showing on your Quick Access toolbar.

Quick Tips

To prevent premature or accidental sending of an email before you've finished it, type a string of random letters (as;dasl) in the address bar. The software will not recognize them as an address and will not send the email until they are deleted.

Make favorite websites easier to find by alphabetizing them in your "Favorites" list. In Internet Explorer right-click anywhere on the Favorites menu. On the menu that opens, click Sort by Name. IE will list folders first, then individual web pages.

Coming Up Next

The Spring issue of Portico will focus on Human Resources.

If you have an article, best practice, tech tip, lesson learned or success story relating to Human Resources that you'd like to see in Portico, please submit to Gretchen Renz, CDFA, grenz@bwarch.com by 02/13/15.

Member Spotlight: Kathy Milano, DLR Group

How long have you been with DLR Group? How long in the industry?
I have been in the industry the same amount of time I have been with DLR Group, which is about a year and two months.

I started as a Temporary Receptionist in Sacramento in September 2013. I learned a lot in the six months I was in the Sacramento office. It was my first experience with anything to do with architecture and engineering, and thanks to the patience of the employees there, I learned about the industry. When Seattle had an opening for a project administrator, I felt it was a great opportunity to grow with this company. Thanks to the faith of my Principal in the Sacramento office I was offered the job in Seattle. I transferred from Sacramento on May 7th and started at the Seattle office on May 12th. I have been with the Seattle office for 6 months.

What motivated you to join SDA?
I joined SDA because it is one of the few organizations that focused on administration for architecture, engineering, and design firms. Shannon Soady was kind enough to give me the information on this organization. Going to a few of the meetings allowed me to see that this was an organization I could relate to and would be helpful in navigating the industry.

What do you do at your firm?
As a Project Administrator I do a little bit of everything. My whole goal is to make work as easy as possible for my project managers, project architects, and engineers. I try to have all the little things taken care of so that they are able to focus on the design and construction process. I keep track of all the construction, design, bidding, and correspondence documents, so all of my project managers will have them whenever they need them, and know where to find them.

What challenges you with respect to work/life balance?
The biggest challenge is time, as I am sure everyone deals with. With multiple projects and deadlines, everything can become very time restricted. Trying to find some time for family and friends becomes difficult.

If there was one class (or seminar or workshop) that you could take that would allow you to perform your job more effectively, what class would that be and why?
I would love to take a basic Revit class so I could assist my fellow coworkers with anything they might need related to that program. Learning the simple Revit tools could save my architects and engineers a lot of time and energy.

What activities or hobbies do you enjoy in your spare time?
I like to hike, read, go to museums. Since I just moved here, exploring the city and discovering new parts of Seattle.

What are some of your goals with respect to SDA?
I would like to learn as much as possible to be the best Administrator I can be, and to keep growing and improving in my usage of new techniques and software.

Call for Nominations

This year's National Nominating Committee is currently seeking qualified SDA members to run for positions on the 2014-2015 Executive Committee.

Want to know if you're qualified?

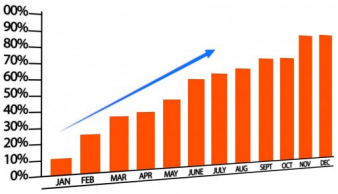
- Are you interested in what's happening in the Society for Design Administration?
- Do you believe that you have leadership qualities that you would like to share with the design community?
- Are you interested in helping steer SDA's future?

If you answered "yes" to any of these questions, then you should consider running for a position on SDA's National Executive Committee.

Roles descriptions, responsibilities, time and financial committment for each position on the Executive Committee can be found on the National website here.

"Close out projects as soon as possible. Why? You have a fiduciary responsibility to make sure your firm's projects are an accurate and a true representation of your business. If a project is left open after the project is complete, there is a possibility of mischarges, and it may also hide or delay the collection of retention or the balance of fixed fee. Not closing out the project in a timely manner may also misrepresent the backlog of contract value that will never be used."

Susan Stewart
Parsons Brinckerhoff



Simplify PowerPoint Visuals: 7 Rules

1. Follow the "six-by-six" rule: Use no more than six words per line and no more than six lines per visual.
2. Apply the "billboard" test to each slide: Could people read and understand the information while driving?
3. Realize that people may forget lists, but they'll recall images. Just make sure you don't overdo the graphics.
4. Avoid using "chart junk," all those fancy shadings and patterns in most drawing software. You'll create the "Two C" effect (comical and confusing) by trying too hard to jazz up a chart.
5. Think "thin" when deciding on line thickness and "discreet" when picking colors. Reason: Thick lines and garish colors will distract readers.
6. Use the "one" principle: Limit each visual to conveying one idea, one concept or one point.
7. Put it to the one-minute test: If the audience will need more than 60 seconds to figure it out, it is too complex.

From AdminProToday.com Business Management Daily

Continued from Page 2

me doing something inefficiently because I'm simply stuck in the rut of "this is how I've always done it".

- I need my team to be power users of the respective software specialties they each have.
- I need my team to be willing to learn new things.
- I need my team to dig in and figure things out on their own when we don't have an established project plan or precedent to follow. Show initiative and create one.
- I need my team to question me on things they don't understand or procedures that don't make any sense. It may be an opportunity to make things work better.
- I need my team to share their ideas and brainstorms with me even if we aren't able to implement each and every idea they present. This openly collaborative environment creates sparks that ignite our projects.
- I need my team to tell me if one of the tasks or projects they are working on is something they absolutely hate doing. I want every member of my team working in their areas of strength the majority of the time so I get their BEST effort every time they touch my projects.
- I need my team to be fully aware of who I am – my strengths, my personality type, my communication styles, my passions, my interests – so they fully understand how and why I work and communicate the way I do.
- I need my team to share who they are with me also – their personality types, interests, strengths – so I can fully appreciate who they are and how best to work with them.
- I need my team to educate me on their communication styles and preferences so we communicate as effectively as possible.
- I need my team to be problem solvers.
- I need my team to take the initiative to fix things that they see need fixing. I need them to get comfortable knowing when to ask and when they should just take care of it.
- I need my team to hold me accountable for doing what I say I'm going to do.
- I need my team to share their professional goals with me so I can support them on their career journey just as they support me on mine.
- I need my team to capture the "to do list" items as we talk through things and then track them to make sure we get them done.
- I need my team to initiate the follow up calls and emails on the "to dos" we are working on so I don't have to remember yet another series of details.
- I need my team to understand how businesses run so they fully understand and participate in what we are doing each and every day.
- I need my team to professionally represent me and my company in all they do.
- I need my team to be patient with me… because just like everyone else, I'm still a work in progress.

This may seem like a lot. It is. But running a department, managing a team, and leading a company is a lot – a lot of details, a lot of moving parts, a lot of responsibility. That's why successful executives need outstanding administrative professionals supporting them.

I can't think of a single executive I've supported that didn't need these same things even though most of them never articulated it to me in these exact words. Like anything, developing this type of working relationship with your executive takes time. You must keep putting forth the effort to educate them on how you can support them at an even deeper level than you have in the past. Even if you've worked with your executive for several years, look for additional ways you can build upon the foundation you've laid and continually improve the working relationship. When you do, there's no doubt you'll become the admin your executive can't imagine his or her corporate life without!

Julie Perrine, CPS/CAP, is a personality strategist, personal brand analyst, and administrative mentor who teaches administrative professionals and entrepreneurs how to increase their professional opportunities and achieve more productive and meaningful relationships by utilizing innovative technology, ideas, and people. Learn more and request your FREE copy of our special report "Creating Your Strategic Administrative Career Plan" at www.AllThingsAdmin.com

Best Practice: Read the Contract - *Judy A. Beebe, CDFA*

For those of you working on projects, one of the best things you can do is to read the contract. Why? So you become familiar with what the project team is expected to do. You can skip the boilerplate and just read the Scope of Work. And if you're pressed for time, just focus on the deliverables (also referred to as work products). Know what deliverables the team is expected to produce. Know when the deliverables are due to the client (the schedule). Once you know what and when, you can plan your work. For example: If four reports are due to the client by December 27, and those reports need admin staff to do an overall quality assurance/quality control check (e.g., check the formatting and spellcheck, make sure all the appendices are listed and attached) are you going to be in the office that week or did you plan on asking for the week of Christmas off? If you planned to take that time off, do you have another admin to cover your work, or do you need to call in a temp?

Speaking of December 27, if you know you'll need your reprographics firm to make 15 copies of each of those four deliverables, have you checked with the repro firm to see if they are open over the Christmas holiday? If they are closed for the holidays, or are going to be short-staffed during the holidays, you should give them an early heads-up so they can plan their workload to make sure they complete your order in time.

Statutes of Repose and Limitations - *ACEC*

Statute of Repose: Statutes of repose bar actions against architects and engineers after a specified period of time following the completion of services or the substantial completion of construction.

Statute of Limitations: Statutes of limitations bar actions against architects and engineers after a specified period of time following an injury or discovery of a deficiency.

It is important to have both a statute of repose and a statute of limitations. Without a statute of repose, a design professional's exposure to a claim could theoretically run indefinitely, since an injury or the discovery of a deficiency could occur at any time. Statutes of repose and limitations work together to limit the total period of time during which the architect or engineer is exposed to liability.

In Washington, the Statute of Repose is 6 years, and the Statute of Limitation is 3 years. Download a list of the Statutes of Repose and Limitations for each state from the American Council of Engineering Companies website.

Don't Forget the Editing Phase!

- Edit first by making revisions. When the document is finished, proofread to check for grammar, spelling and usage errors.
- If you've written the document, step away from it for a while before you proofread it. Your mind tends to insert what you intended to say and overlooks what you actually wrote.
- Proof only one line at a time.
- Read everything straight through from beginning to end, including all titles.
- Read the document aloud.
- Read the pages out of order as an alternate check. Check changes in typefaces, such as headlines and subheads.
- Double-check references to charts or other sections, to verify their locations.
- Scrutinize features that come in sets, such as quotations marks and brackets.
- Check for consistency in capitalization throughout the document.
- Check for consistency in names and places.
- Don't rely solely on word processing programs as they don't always catch words that are similar with different meanings or industry-specific words.
- Look up the spelling of proper names, scientific and technical terms that you're not familiar with to make sure they are correct.

Member Spotlight: Marjorie Nelch, Gelotte Hommas

How long have you been with Gelotte Hommas? How long in the industry?
I have been at GHA for a year and a half. This was my first venture into the A/E industry!

What motivated you to join SDA?
I wanted to advance in my career at GHA. We had Office Managers previously who were part of SDA and our firm greatly benefited from the education and community SDA has to offer, so I decided to join as well.

What do you do at your firm?
I am the Office Administrator here. I do a wide variety of things! I manage everything from the front desk to the back of the office, assist with bookkeeping and marketing, compose and edit correspondence for the Principals, and act as a bit of an office mom.

What challenges you with respect to work/life balance?
Time management is my biggest challenge. It's easy to let work dominate your life and leave no room to breathe. Time management skills make me feel (and actually be) more effective with my time so I don't feel overwhelmed after I get off the clock!

If there was one class (or seminar or workshop) that you could take that would allow you to perform your job more effectively, what class would that be and why?
"How to Ask Effective Questions" I have learned in my short time here that when a task is put on my desk my assumptions of that task and what is actually being asked of me are two different things. Sometimes it can be a difficult learning curve to communicate with the person you are working with. Especially coming from the "I'm helping you out" end, it's hard to form questions that are effective and respectful at the same time.

What activities or hobbies do you enjoy in your spare time?
I'm a professional musician outside of work. I spend almost all of my time outside work practicing, playing shows, and networking with other musicians in the Seattle area.

What are some of your goals with respect to SDA?
One of my goals is to attend seminars and workshops, I know there is a lot to be learned in this organization. I also would love to meet other professionals in the area. I also want to learn new skills and strategies to improve the Business Management end of our firm. That is the direction my position is headed and I want to build myself up to it.

TEST YOUR PROJECT ADMINISTRATION IQ

1. Which of the following scheduling techniques uses a bar chart to display when tasks are supposed to be done compared to the actual progress on each?
   a. PERT chart
   b. MBO
   c. Gantt chart
   d. Critical Path chart

2. This type of estimate is predicated on historical data and expert judgment.
   a. Top-down
   b. Bottom-up
   c. Parametric
   d. Appraisal

3. Which of these can convey that you've achieved the completion of an interim key deliverable?
   a. Completion criteria
   b. Milestone
   c. Gantt Chart
   d. Project sign-off document

4. All of the following represent a category of fee contract commonly used in the A/E/C industry except for which one?
   a. Time-and-materials
   b. Percentage of construction cost
   c. Fixed-price
   d. Fixed-price plus incentive

The above are examples of the types of questions that are covered on the CDFA Certification Exam. From the SDA National website: "CDFA certification recognizes an individual who has met a rigorous standard of experience and expertise in design firm management and administration and who has demonstrated their knowledge of the practice and related disciplines through a thorough examination of management and administrative competencies." Visit www.sdanational.org for more information about CDFA certification. Get certified today!

Answers: 1. c, 2. a, 3. b, 4. d

About SDA

For over 50 years, the Society for Design Administration (SDA) has promoted education and best practices in management and professional standards of design firm administration. SDA membership stretches across the United States and Canada, and is composed of personnel working in the design industry for architectural, engineering, construction, and related industry firms.

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"Since 1999, United Reprographics has been committed to providing unparalleled reprographic services to hundreds of clients throughout the Puget Sound. Locally owned and operated, our decision-makers are on-site and available, allowing us to offer our clients flexibility that large corporations cannot match.

We attribute our continuing success to the caliber of the staff and team that serve you every day at United. That's because each and every person at United Reprographics is dedicated to creating a new service standard, to ensure your projects are delivered on-time, on-budget and to your complete satisfaction. And we will Bend Over Backwards to prove it to you!

What does our Bend Over Backwards Service Guarantee mean to you? It is our promise that each and every project we work on for you will be put through a 14-step service process that starts from the moment you contact us for a job to the moment it is delivered into your hands.

Since we launched United Reprographics as a minority-owned, community business, the honesty with which we operate and the customer loyalty we've earned have been the hallmarks of our business. Our goal is to provide a level of service and support that ensures your project is completed without incident."

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