Join us for SDA’s first ever four-day virtual education conference and advance your career.

Learn the latest trends in the A/E/C industry to help cultivate your staff’s leadership and management skills while helping your firm stay a step ahead of the competition.

Full conference “Early Bird” member rate is $225. One-Day member rate is $75.

Visit sdanational.org to download the full conference brochure and register online.

**Schedule at a Glance**

**Monday, May 4, 2015**
12:00 - 1:30pm Eastern. Strategic Planning: Design Business Strategy into Action and Results
3:00-4:30pm Eastern. Why Design Professionals Should Embrace Integrated Delivery

**Tuesday, May 5, 2015**
12:00 - 1:00pm Eastern. Onboarding: More Than Just Orientation
3:00-4:00pm Eastern. What is the Right Value for Your Firm

**Wednesday, May 6, 2015**
12:00 - 1:00pm Eastern. Composing a Winning Application for Professional Liability Insurance
3:00-4:00pm Eastern. RFQs/RFPs - Preparing a Winning Response

**Thursday, May 7, 2015**
12:00 - 1:00pm Eastern. Effective Financial Management of Design Firms
3:00-4:00pm Eastern. Farewell to Death by PowerPoint

**Friday, May 8, 2015**
3:00-4:30pm Eastern. SDA 2015 Annual Business Meeting
*SDA Members Only*
Make New Hires Love Your Company from Day 1

Karina Young is the Office Manager at Khan Academy where she keeps the office running and team fueled so they can continue to do amazing things. This article originally appeared on officeninjas.com

Getting ready for a new hire can be a lot of work. Depending on your team, all of the prep may fall on you. If that’s the case, you know there’s so much more behind getting a new person settled in and ramped up than buying a new Mac and picking a desk. It takes thoughtful planning and consideration to truly integrate a new employee into your company’s office, culture, and work life.

If you’re stuck in a rut (same routine, same welcome breakfast, same speeches, etc.), now is the time to mix it up. Shake the mothballs off your onboarding program and take your new hire’s experience to the next level with these ideas below.

Kick Off Time

First impressions are the ones that last, and this is a pivotal moment in setting the tone for your new hire’s onboarding experience. But, if a new hire’s first impression happens first thing in the morning, it will conflict with your own daily routine (checking emails, scrambling around the office, putting out fires). In order to give your new hire the attention and time they deserve, why not push their start time? One of my favorite pieces of advice on new hires comes from Carly Guthrie’s First Round interview (a must read for anyone who handles onboarding): Don’t ask your new hire to come in at 9 A.M. Tell them to come in a bit later so you can get through the morning madness and greet them with your full, undivided attention.

Bring Your Culture to Them

You can teach a new hire all about processes, programs and people, but the one thing that most companies struggle with is how to integrate new hires into their culture. If you have been with your company a while it may feel strange to lay out your culture in a format for outsiders to understand, but doing so is really important.

At my last company, the easiest way for us to give newbies an idea of who we were was to review our “House Rules.” They were rules written by the team and each office had their own. The rules went beyond the usual “be nice” and “clean up after yourself,” and listed fun mottos that were unique to us like “Always Kick Ass” and “Friday Means Beer Time.” We hung them in our entrance and stamped them inside notebooks so that every new hire was surrounded by our culture. It was a constant reminder of what we stood for and what made us quirky and unique.

Give Something to Write Home About

Your new hire expects to get a certain amount of swag during their first week. A shirt, a bag, stickers or a water bottle—all things we have too many of and never use. Instead of giving them more stuff that will end up in a junk drawer, give your new hire something useful and memorable.

At Khan Academy, we have a great tradition called Khanniversaries: on your work anniversary, you’re asked to give a gift back to the company. One of my teammates, David Hu, recently made these amazing books filled with our teams’ perspectives on work, life, happiness, and everything in between (read more on his blog here). Although these were intended as a one-time gift, they have become a big part of our new hire onboarding. It’s the perfect gift to give on the last day of their first week as a way to say “Welcome to the Club!” This book not only represents the completion of their initial onboarding, but it gives new hires a glimpse inside our team’s hearts and minds and excites them for the adventure they have ahead.

No matter what you decide to do for your new hire, the most important thing to remember is to be true to your company. Take time to pick out the quirks that make your company special and turn them into something fun for new employees. Don’t let your onboarding program become a routine; turn it into an experience that your new hires will never forget!

Read the original article and check out other amazing content at officeninjas.com.
President’s Message

Hello Seattle chapter members and readers at large. I hope you enjoy this issue of Portico. Editor Gretchen Renz has a focused approach for sharing knowledge and news with you each quarter, based on the administrative areas found in every design firm office: finance, human resources, general office administration, project management/administration, and marketing.

This issue is focused on human resources. One could say that the original business of HR was making sure the firm was compliant; it’s much more than that now. HR staff are attending top-level, strategic firm planning sessions, and they are helping shape the firm’s culture of staff development, engagement, and retention.

The Seattle chapter board of directors works around the same concepts. It’s our job to offer business practice events and opportunities to help develop and grow our members’ skills and knowledge. It’s our responsibility to engage our members—by asking for their feedback and opinion and suggestions, and by offering leadership opportunities. It’s our responsibility to help enable SDA to remain a value-added organization, so that members will continue to renew their membership, because they see a return on their investment.

Speaking of return on investment . . . members, if you want another avenue to share or grow your leadership skill, now is the time to consider serving on the Seattle chapter board of directors. Doing so is an investment in your growth, and it’s an investment in the chapter. The Nominating Committee (Stacy Rowland, chair, Renae Howard, and Kathy Milano) has begun its search for members to serve on the 2015-2016 board. Please give it some thought, okay? Serving on the board can be a very rewarding, career-building experience.

Until then,

Judy Beebe, CDFA
Getting the Most from Your 401(k) Plan? How to Achieve Your Objectives
Mary Dickinson, Principal, Bader Martin, PS

Never stop questioning. It’s great advice from Einstein—and even if he wasn’t thinking of your company’s 401(k) plan at the time, it’s still great advice.

Too often, an employer implements a 401(k) plan simply by checking boxes on an adoption agreement and rarely thinks of it again. But professionals expect to be offered a competitive retirement plan at work. And employers should expect to achieve measurable benefits as a result of offering such a plan.

As the company sponsor of a 401(k) plan, there are two critical questions that deserve your attention on a fairly regular basis:

• Why are you offering a 401(k) plan? In other words, what are your goals?
• Is your plan achieving those goals — for you, your employees and your business?

Typically, an employer establishes a 401(k) plan for any or all of the reasons discussed below. For each goal, the discussion includes ways to measure the plan’s effectiveness and various plan features that may help to more closely align your plan and goals.

Providing retirement benefits to owners and other key or highly compensated employees

If your plan is achieving this goal, the amount of tax-deferred retirement savings for your company’s owners and key employees should increase significantly over time.

If it’s not, there are two primary options available to you: a safe harbor 401(k) match or, perhaps, a switch to something other than a 401(k) plan.

Safe Harbor Match

Annual discrimination testing can sometimes prevent highly compensated employees from deferring the maximum allowable amount each year. Your plan may be able to avoid this annual discrimination testing under the safe harbor 401(k) match rules.

A safe harbor 401(k) plan is not subject to the normal Actual Deferral Percentage (ADP) and Actual Contribution Percentage (ACP) anti-discrimination tests or the Top Heavy Minimum Contribution rules.

A safe harbor match benefits highly compensated employees by breaking the link between employee deferrals and owner deferral rates. Without a safe harbor match, the amount highly compensated employees can defer is limited by the deferrals of nonhighly compensated employees.

The required contribution amounts under the safe harbor match are determined based on either of two approaches: a matching contribution to participants who are deferring income or a non-elective contribution to all eligible employees. As employer, you must notify your employees — before the beginning of each plan year — which of the two safe harbor alternatives will apply to the coming year.

• Matching Contribution: An employer matching contribution is made only to those employees who contribute to the plan from their own pay. The employer matches dollar for dollar the first three percent employees defer plus 50 cents on the dollar for the next two percent of employee deferral, for a total match of four percent.

• Non-Elective Contribution: An employer contribution is made to all eligible participants, whether or not the employee contributions to the plan. The minimum contribution amount required under this approach is three percent of pay.

Opportunities Beyond the 401(k): Profit Sharing and Cash-Balance Plans

If you aren’t reaching your goal under the safe harbor match rules, it may be time to consider other options to supplement your 401(k) plan.

You can increase retirement savings for your company’s owners and key employees by adding a profit sharing plan — particularly one with a formula that integrates employer contributions with Social Security. Under current rules, this approach can potentially increase annual contributions for owners to as much as $53,000.

You can help your company’s owners and key employees build substantial retirement assets in a short period of time by adding a cash-balance plan. With a well designed plan, they may be able to make contributions of as much $250,000 per year.

Cash-balance plans are more complicated than 401(k) plans and have higher administrative costs. They are a form of defined-benefit plan and, like other defined-benefit plans, have
the potential to require large contributions at a time when the company isn’t able to afford them. On the other hand, cash-balance plans are more predictable than standard defined-benefit plans and provide an opportunity to contribute huge amounts for retirement.

**Encouraging all employees to save for retirement**

This one’s easy to measure. What percentage of your eligible employees actually participates in the plan?

If the percentage is less than your goal, there are three main ways to increase participation: education, auto-enrollment and research.

**Employee Education:** Plan participation typically increases when employees are educated about the benefits of saving for their retirement. This is especially true for younger employees who are decades away from retirement and don’t fully understand the enormous benefits from starting to save now.

**Auto-Enrollment:** You can achieve a high level of participation using an auto-enrollment feature, which automatically includes all eligible employees in the plan unless they specifically opt out. You might automatically enroll all eligible employees with a three percent salary deferral, for example, and include automatic annual increases in the deferral rate up to a maximum of ten percent.

Auto-enrollment generally increases the amount that highly compensated employees may defer by increasing the deferral rate for non-highly compensated employees.

**Research:** Sometimes it’s just a matter of understanding what employees really care about. If you’ve educated your employees on the workings and benefits of the plan and you have an auto-enrollment feature, there may be aspects of the plan’s design or investment options that aren’t resonating with your employees.

- **Goal:** Enabling the 401(k) Plan
  - Providing retirement benefits to owners and key or highly compensated employees.
  - Encouraging all employees to save for retirement.
  - Recruiting and retaining highly qualified employees.
  - Sharing profits with the team that helped generate them.

- **Metrics to Measure Results**
  - Amount of tax-deferred retirement savings for owners and key employees over time.
  - Proportion of eligible employees participating in the plan.
  - Comparisons to competitors’ offerings.
  - Survey results from existing employees.
  - Answers to questions about retirement benefits in hiring and exit interviews.
  - Compensation and benefits as a percentage of sales.
  - The percentage of net income shared with employees, and with whom it is shared.

In this case, you might consider an anonymous employee survey, or even consider engaging an independent plan consultant to evaluate your plan based on the specific needs and interests of your employees.

Interestingly, the results of your research may provide an added benefit to you as company sponsor. In one case, for example, a professional services firm found that a segment of its employees did not value one of the two available plans. As a result, it dropped the plan for this employee segment and saved considerable time and money.

**Recruiting and retaining highly qualified employees**

Research is also important in recruiting and retaining employees. It’s critical to understand what they value and what your competition is offering. Employee surveys are one option, and including benefits-related questions in exit surveys is another.

If your success rate in attracting highly qualified employees, or your retention rate for skilled and experienced employees is lower than you’d like (or lower than industry averages), your benefit plan may be a contributor.

It’s often possible to adapt various aspects of your plan — for example, the amount of the employer match or the time over which it vests — to make it more appealing to potential employees and more valuable to existing employees.

**Sharing profits with the team that helped generate them**

Deciding who shares in company profits and the amount they receive is a management decision not exclusively confined to the retirement plan. There are many ways to share revenue or profits with employees. A bonus plan is one option. A profit sharing plan is another.

Ultimately, your company’s retirement plan is in place to achieve certain business objectives. The company expends time and resources to establish and operate the plans, so it’s critical to ensure the goals remain relevant and the plan continues to perform as intended in achieving those goals.

Mary Dickinson, CPA is a Principal at Bader Martin. She handles both tax and financial statement work for professional service firms ranging in size from 1 to 300 people. She also audits retirement plans and consults at the firm and individual level. She is a Chartered Global Management Accountant (CGMA).
Recap: February Design Charrette Program

Our February design charrettes program was a fun, hands-on event. Presenters Lucas Branham and Pepe Izquierdo, architects with Studio Meng Strazzara, first provided an overview of the why/what/how of charrettes, then split attendees into teams. The challenge was to build a freestanding tower out of 20 spaghetti strands, a long piece of tape, a shorter piece of spring, and, oh yeah, it has to be topped off with a marshmallow. It was all about collaboration—working through a concept (build the tallest marshmallow tower) then coming back for Round 2 to refine the concept (fix any structural flaws) to come up with an even taller, freestanding marshmallow tower. In Round 1, three teams built structures of varying heights: 17-1/4 inches, and 11 inches, but the third structure couldn’t be measured because it fell over right when time was called. In Round 2, the winning team—Carrie Thompson, Shannon Soady, and Kathy Milano (team member Judy Beebe confessed to no building skills, so she took on the role of team photographer)—built a 23.5-inch structure to win the competition. The second place team—Renae Howard, Cathy Comstock, Stacy Rowland, Kristin Ashton, and Krista Whitters)—were only inches away, however; their structure was 21.5 inches tall.

Many thanks to Lucas and Pepe from Studio Meng Strazzara for the presentation and to all those who participated.
QUESTIONS OF THE QUARTER

What have you wasted hours of your work life doing?

• Finding papers that were not properly filed! I have spent so much time sifting through stacks of papers or rifling through file drawers searching for something, only to find it in an incorrect location. We’ve tightened up our file maintenance policies (including proper coding), which has helped dramatically. (Carrie Thompson, Studio Meng Strazzara)

• Trying to “force” people to complete their timesheets on time. (Shannon Soady, DLR Group)

• Fixing copy machine paper jams. (Judy Beebe, Parsons Brinckerhoff)

• Formatting specifications. Working for a mechanical engineering firm, we submit specifications to many different architects, each with their own formatting style. Something as simple as Section numbers “1.1 SUMMARY” could be formatted many different ways. I strive to match each architect’s formatting preference so the final product does not visually differentiate between architectural and mechanical specifications. (Faith Brown, MSI Engineers)

• Dealing with computer problems. (Stacy Harris, Bernardo|Wills Architects)

• Keeping everyone on the same page and sorting out confusion. Good communication is vital and it takes a lot of time to sort out lack of communication. (Carla Lancaster, Bernardo|Wills Architects)

What is one thing you wish you’d figured out sooner in life?

• That it is OK to say no. When I was younger I felt obligated to always say yes—and while that has a lot of merit and helps a person learn and grow and experience new opportunities, you have to be careful not to overextend yourself. There were times when my day was spread so thin I never felt like I was actually accomplishing anything; learning to say “no” allowed me to focus on a smaller but more impactful array of activities. (Carrie Thompson, Studio Meng Strazzara)

• You can’t please everyone, but it’s all in how you deliver the bad news. (Shannon Soady, DLR Group)

• That not everyone has the desire or drive or cares about producing quality work. (Judy Beebe, Parsons Brinckerhoff)

• Being able to learn the right answers will help you more than knowing the right answers. The ability to learn as things change, in life and in work, will always be a constant part of our human experience. Knowing the right answers today is great, but they may not be the right answers for the ever changing tomorrow. Learn, Grow, Success, Repeat! (Faith Brown, MSI Engineers)

• How to be grateful for what I have. (Stacy Harris, Bernardo|Wills Architects)

• Saving for retirement is VERY important! (Carla Lancaster, Bernardo|Wills Architects)

What popular business phrase do you wish was banned?

• “Think outside the box” drives me crazy, it’s so overused. (Carrie Thompson, Studio Meng Strazzara)

• The use of “impact” as a verb. (Shannon Soady, DLR Group)

• “Think outside the box.” (Judy Beebe, Parsons Brinckerhoff)

• “Green!!” If I want a “green” building I would expect to see some green fiberboard with green tinted glazing – perhaps some moss growing over the concrete foundations. I believe the term you’re looking for is sustainable! (Faith Brown, MSI Engineers)

• “Best Practice.” Ugh! (Stacy Harris, Bernardo|Wills Architects)

• “We are there for you.” I don’t want to hear these words from a business; I want to see it. I don’t want a business to be my best friend; I want them to be the business connection that makes a difference and stands by their word. (Carla Lancaster, Bernardo|Wills Architects)

Thanks for telling us what is on your minds!
Recap: Heard at the Delegation Roundtable

On February 11, chapter members met in person and via conference call for a roundtable discussion on effective delegation. Lots of great information was exchanged, including the following key points:

- Present delegation of tasks in terms of how it will benefit the person being delegated to.
- Let the delegatee know how the task they are taking on affects others.
- Delegate tasks that speak to the delegatee’s strengths or interests.
- Assess your expectations. Are you expecting perfection? You should expect quality and meeting the deadline.
- When you delegate, make sure the delegatee understands what level of authority they have over the task.
- Make sure the delegatee gets the recognition and credit for the tasks they completed—both from you and from others. Tell others to thank them.
- Change your approach. If someone has a defense mechanism, take a different approach with them when you delegate.
- Watch your language. Not many people are willing to admit to a superior or peer that they don’t know how to do something. Try the phrase “Can I show you how to do this?” rather than “Do you know how to do this?”
- Delegate using the sneaky approach: Wonder aloud how you might accomplish a certain task and see if your “target” delegatee volunteers ideas or offers to take the task on.
- Schedule check-ins and tailor them to your delegatee's preferences. Ask them how they prefer to have check-ins with you. Weekly? Monthly? In person? Via email?
- No one likes a manager who ticks and flicks. Don’t just “flick” an assignment onto someone’s desk (so you can “tick” it off your list) without any instructions, information, or timeline.

Sound Bites

“If you think hiring professionals is expensive, try hiring amateurs.”

~ Anonymous

Leadership Opportunities

The SDA Seattle Nominating Committee has begun their search for eligible chapter members to serve on the 2015 - 2016 Board of Directors. The committee is looking for candidates to fill the positions of President-elect, Vice President, Secretary, Treasurer, and Director.

We are at an exciting time in the history of our chapter. Serving on the board is just one way you can get involved, personally and professionally.

If you are interested in serving on the board, please contact committee members Stacy Rowland (Chair), Renae Howard, or Kathy Milano.

You may not be prepared to take on a board position this year, but our chapter has many standing committees that are looking for members. Consider joining a committee and sharing your expertise with us.

- Auditing
- Bylaws
- Certification
- Education
- Finance
- Historical
- Membership
- Program
- Publication/Newsletter
- Public Relations

Contact any board member for more information about the roles and responsibilities of these committees.

The more we share, the more we grow!
A TRADITION WORTH HOWLING ABOUT!

If you ever visit Studio Meng Strazzara in Seattle (member Carrie Thompson’s firm), and you hear the cowbell clang; don’t worry, they’re not calling all cows. It means their sister firm, Meng Analysis, has just won another project. Yes, someone will reach up and clang that fanciful bell with the howling coyote on top. When the bell was first hung in the office, there was no intent for it to be clanged; but then someone rang it after getting excited about winning a job, and well... that’s the reason the bell still hangs there in the lobby. Now, whenever the bell rings, “Whoohoos” always follow. Congratulations in advance, Meng Analysis, on your next cowbell clang!

Quick Tips:

Use this shortcut to move Word text without losing track of what you’re doing: Select the text you want to move, and press “F2.” In the status bar at the bottom of the Word window, you’ll see a message “Move to where?” Position the insertion point where you want the selection to appear, and then press “Enter.”

Squeeze more out of the Tasks section of Outlook: When someone asks you to do “x” by 5 pm, turn the request into a Task. Here’s how: Open a new Task, make a note to do “x,” set a reminder, save and close it. Now you can refocus on the business at hand, assured that Outlook will remember the Task for you (and remind you!)

Cut to the chase by using [NM] or [EOM] (they stand for “no message” or “end of message”) in the subject line of an email that is simply a “thank you” or an “OK.” That way, no one need open it.

Virtual task master Toodledo (toodledo.com) offers a full slate of ways to enter, organized, and sort your tasks.

From AdminProToday.com, Business Management Daily

TEST YOUR HUMAN RESOURCES IQ

1. A compensation program should address which of the following objectives?
   a. legal compliance with all appropriate laws and regulations.
   b. cost effectiveness for the organization.
   c. internal, external, and individual equity for employees.
   d. all of the above.

2. A workweek in which a full week’s work is accomplished in fewer than five days is known as:
   a. Flextime
   b. Virtual Offices
   c. Compressed Workweek
   d. Telecommuting

3. Employment-at-will involves:
   a. An agreement by both parties to an employment contract.
   b. Protection by collective bargaining
   c. Termination provisions for just cause dismissals
   d. The ability of either party to terminate the employment relationship at any time.

4. FMLA requires employers having _______ employees within a ____ mile radius provide 12 weeks of protection for qualified employees.
   a. 50, 50
   b. 50, 75
   c. 100, 50
   d. 100, 75

5. Which of the following categories is not an example of an exempt classification?
   a. Executive
   b. Sales
   c. Professional
   d. Technical

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. d 2. c 3. d 4. b 5. d

Society for Design Administration, Seattle Chapter
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.

Contact SDA Seattle
c/o Judy Beebe, CDFA
Parsons Brinckerhoff
999 Third Avenue, Suite 3200
Seattle, WA 98104
P: 206-382-6368
E: beebe@pbworld.com
W: sda-seattle.org

Thank You! to our Sponsors

unitedreprographics.com

“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.”

sallydisciullo.blogspot.com

Olympic Range Sponsor

Mt. Baker Sponsor

Let’s Get Social

Like us on Facebook
Join our group
Follow us on Twitter

Visit Our Websites

SDA  sda-seattle.org
SDA  sdanational.org

Portico is published quarterly. Please send comments, suggestions, announcements and articles to the Editor, Gretchen Renz, at grenz@bwarch.com.