

Seattle Chapter turns 45!

Happy 45th birthday to the Seattle chapter! We've come a long way, baby, since 1968: We transitioned through name changes, from *Architectural Secretaries Association*, *Society of Architectural Administrators*, and *Society of Design Administration*, and finally to *Society for Design Administration*. We retooled our educational focus, based on the practice areas of design-industry firms. We share knowledge quickly through the national member forums. We grow our professional networking circle one new member at a time.

The 2013-2014 Board of Directors

It takes a tremendous amount of effort to manage a successful chapter, and once again, we are in good hands with the new board of directors.



Left to right: Director Susan Vestal, CDFA; Vice President Renae Howard, CDFA; Secretary Lois Diemert, CDFA; Treasurer Pakalana Patterson, CDFA; Julie Stalzer (later resigned as President -Elected due to relocation to Omaha); President Stacy Rowland, CDFA.

The President's Installation Speech

Thank you for allowing me the honor of serving as your president for another term. We had a really successful year. We met and exceeded most of our goals, and we are continuing to work on others. This year, I pledge to keep our momentum going on membership—growing our chapter and helping our new members gain the full value that SDA membership offers. I also plan to work with the Education Committee to continue offering the high-quality level of educational programs we have had this year. We are still struggling with fundraising, and I plan to make that a priority for the 2013-14 term.

After returning from EDSymposium13, I am on fire with excitement for our chapter's potential, and I am full of pride about our profession. I heard an expression this week that I want to share with you: "Why would you only reach for the sky when you could reach the moon? And if you aim for the moon and miss, you'll still fall among the stars." There's another expression I keep hearing that drives me crazy: "It is what it is." I always want to scream, "Why? Why can't it be what I want it to be? Can I not change what it is to make it better?" I want to challenge each of you to reach for that

moon this year. Set a goal for yourself to push yourself just a little bit further than you thought you could go. Try something new and a little bit scary. That's when true growth happens. Together, we can make SDA an even more vital and necessary force in elevating the profession of design firm administration.

Gearing up for the coming months

The Board held a **Planning Retreat** one sunny Saturday in July, brainstorming educational programs and social networking events for the coming year, reviewing the Strategic Plan, and discussing chapter operations.



Planning Retreat (left to right): Pakalana Patterson, Stacy Rowland, Renae Howard, Julie Stalzer, Susan Vestal.

The Board is also looking for members to serve on a **Task Force** to plan a special, one-time, fun networking event in honor of the chapter's 45th anniversary. Will you help, please? Contact Stacy Rowland at either stacyr@bergerpartnership.com or 206-325-6877.

Excellence in
Design Firm Management **SDA**

Mark Your Calendars!

Seattle Design Festival
September 13-22
designinpublic.org

Are you ever going to retire?
September 19
Best Western Executive Inn,
Seattle

PARK(ING) Day in Seattle
September 20
parkingday.org

Wining, Dining, and Teeing-off
October 17
Best Western Executive Inn,
Seattle

Discounts for new chapter members
October 1-31

Microsoft Word
November 21

EDSymposium14
May 14-17, 2014

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Technology Transfer: Trace Precedents in Excel

A quick quality check to make sure you've captured all the cells necessary for the results in another cell can be performed by using Trace Precedents.

1. Select the cell you want to check (for this example, cell B27 as shown in the screen shot below).
2. Under **Formulas**, select **Trace Precedents**. See the three dots on the blue arrow that are in cells B18, B21, and B25? The active cell is pulling data from the three cells identified by those dots. Same thing for Column D; cells D12 and D29 add up to the result shown in D31.
3. To remove the trace arrows, click Remove Arrows.

	A	B	C	D	E	F	G	H	I
4		Low		High					
5	Consultant XYZ								
6	Quarterly Meetings	\$ 103,200.00	- \$	137,600.00					
7	Preparation Time	\$ 412,800.00	- \$	688,000.00					
8	Travel Expenses	\$ 1,426.66	- \$	42,836.40					
9	Sub-total	\$ 517,426.66	- \$	868,436.40					
10	Less Travel	\$ 1,426.66	\$	42,836.40					
11									
12	Client Total Costs	\$ 516,000.00	- \$	825,600.00					
13									
14		Low		High					
15	Consultant ABC								
16	Executive Sessions	\$ 68,000.00	- \$	68,000.00					
17	Session Venue	\$ 4,220.00	- \$	4,220.00					
18	Travel Expenses	\$ 25,167.20	- \$	25,167.20					
19	General Sessions	\$ 188,000.00	- \$	282,000.00					
20	Session Venue	\$ 51,000.00	- \$	76,500.00					
21	Travel Expenses	\$ 25,167.20	- \$	32,930.40					
22	Monthly Surveys	\$ 39,200.00	- \$	39,200.00					
23	Derivative Workshop	\$ 34,000.00	- \$	34,000.00					
24	Workshop Venue	\$ 25,500.00	- \$	25,500.00					
25	Travel Expenses	\$ 12,583.60	- \$	12,583.60					
26	Sub-total	\$ 472,838.00	- \$	600,101.20					
27	Less Travel	\$ 62,918.00	- \$	70,681.20					
28									
29	Client Total Costs	\$ 409,920.00	- \$	529,420.00					
30									
31	Client Cost Estimate	\$ 925,920.00	- \$	1,355,020.00					
32									

Member Profiles: Susan Vestal, CDFA, and Terry Bolendar, SDA/C

In light of our chapter's 45th anniversary, it's only fitting that we check in with two members who can share early memories.

SUSAN VESTAL, CDFA, became a member in 1970.



How long have you been with Harthorne Hagen Architects?

Susan: I have been with Harthorne Hagen Architects for 48-1/2 years; since January 18, 1965. With no previous experience in the field of architecture, I used to go into the drafting room every day for my vocabulary lesson—lots of unfamiliar words in the specifications and reports I was typing.

What motivated you to join SDA?

Susan: My firm received a membership drive mailing and I was very interested, so I asked if I could attend the meeting. I went, was warmly welcomed, heard about the educational opportunities, and decided to join. The firm agreed to pay for the membership, although I paid for my own dinners the first few years. [Seattle chapter President] Virginia Hansen asked me to be a member of

her Board, and so I served, including two terms as the chapter President, continuously from 1971 through 1980 or so. I attended several National Conventions (now called EDSymposiums) both in the '70s and again in the '90s. In 1976, the Seattle Chapter assisted Virginia, then the National Education Chair, in developing a 12-session course for presenting to beginning architects and administrators [called *Design Firm Overview*, it was a well-attended, one night per week event held at NBBJ's office in Pioneer Square].

What do you do at your firm?

Susan: I am the Office Manager, and responsible for everything except the drawings and the accounting, although I still do a lot of the bookkeeping, all of which I did until 1994. I enjoy client contacts and have met some wonderful people over the years through that. Specifications are a big part of my job, and they have come a long way from the first high school [project] specs I did in 1967, on ditto, with a hand-cranked ditto machine. We now have someone who handles most of the marketing with respect to RFQ responses, so my responsibilities in that arena are less than they used to be.

What activities or hobbies do you enjoy in your spare time?

Susan: Reading, crossword and jigsaw puzzles, travel,

symphony and ballet performances, musicals, Gilbert & Sullivan, spending time with my adult children and my one-year-old granddaughter.

What are some of your goals with respect to SDA?

Susan: I achieved certification in 1992, which was a personal goal, and renewed that the first time. I had to cut back my SDA participation after that due to extended family health and other issues, so did not do the second renewal which would have meant lifetime. I was awarded Life membership in the Chapter in 1982, and I received the first ROSE (recognition of special effort) award in 2000. At this point in my life and career, I don't have any further SDA goals, but I still appreciate the educational opportunities and the friendships offered.

What were some of your fondest memories from the national conventions?

Susan: The 1975 convention in Atlanta was special because Virginia Hansen, the first Seattle chapter president, served as the national president (Virginia also served as the national Education Chair in the early '70s). The 1976 Convention was held in Philadelphia, and it was so great to be there during the Bicentennial year: there were costumed actors performing at every corner, and special events held; visiting all the historic places

like Independence Hall and the Liberty Bell (which was in a special pavilion for the year); and large groups of us would go have lobster dinners at Bookbinders, a famous restaurant. The 1992 Convention in Boston was also a great one for me, as I passed my certification interview, and the city has a lot of historic sites, such as Trinity Church, the Old North Church, and the Boston Common, as well as the "Cheers" tavern. My other favorite convention memories include the always-strong attendance from the Seattle Chapter, seeing many Seattle members active at the national level as members of the Executive Committee (ExCom) and as committee chairs, being there when Stacy Rowland was first elected to ExCom, great educational offerings, and reconnecting with SDA friends from across the country.

In the early years, what did the architectural principals think of the organization, those that had members in their firm? Did there seem to be agreement among the principals that ASA was a good thing? Or did the chapter have to work hard to make the member-firm principals realize ASA was a good thing?

Susan: Some firms, especially the larger ones, definitely saw the value, but overall we had to work pretty hard to make it clear that we were

(Continued on page 4)

Member Profiles (continued from page 3)

not just a "social club." A firm like TRA, which did see the value and consistently had five or six members, loved our Seattle Chapter "Bosses Night" annual event, and all seven TRA partners always attended; they were very supportive. Another really fun memory for me at the chapter level was surprising Virginia Hansen with the Seattle Chapter's first-ever Lifetime membership.

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?

Susan: How to retire gracefully! How to help me and my firm search for and hire someone to train as my replacement, then transition out successfully.

TERRY BOLENDER, SDA/C became a member in 1980.



We caught up with Terry to find out what she's been doing since she's retired from the industry. She joined the organization in 1980 when it was called ASA. The Seattle

chapter awarded her Lifetime membership, and she was granted national Honorary membership during the 2005 Las Vegas convention.

What motivated you to join SDA?

Terry: I was invited by an active member, Eloise Hern, who hired me for my first office job at Aehle, Thurman & deMers. Eloise introduced me to Susie Vestal, Robbie Ralkowski, and many others. My parents instilled in me the value of life-long learning, and so joining the organization was a natural choice.

You served as the 1982 chapter president and as the national president for a two-year term in 1996. What obstacles did you face with respect to establishing SDA as a known entity in the A/E/C industry?

Terry: When I was a national officer, we had great success with our affiliation with the AIA. We worked very hard to establish a steady, professional presence, and so when I became national president, I appointed Carole Steadham (then Vice President) to fill my role as the primary contact person with national AIA. I did that because I knew Carole was the one most likely to become [the next] President-Elect and ultimately President. By having her take on those responsibilities, we had the same SDA person working

with the AIA for over four years. In the years before that and after, that relationship was made more difficult with the revolving door of SDA people who worked with the AIA. During that time, two or three of our SDA members were elected as honorary members of the national AIA.

Certainly, we had to work to establish ourselves as a professional organization. Our publication of the *Design Firm Handbook* (Wiley & Sons) and the establishment of the college curriculum were huge strides in being recognized as industry experts.

I often felt that SDA was its own obstacle because of the way that we viewed ourselves and the way we presented our projects to the A/E/C community. For example, we would hold seminars that cost only \$5 (devaluing the product), and we would have a "bosses" night (devaluing our members by putting the "boss" on a pedestal) with skits (yikes, we really did that!). But we gained ground when we presented great educational programs, first-class social events (such as our annual fundraising wine-tasting party), and a creative community project (Canstruction®).

What do you feel were your biggest accomplishments while serving as the local and national president?

Terry: I've always said that the most important part of leadership is to develop leaders for the future. Put good people in the right places and let them do their work. So it's hard for me to look back and choose, not just because it has been many years, but also because they were not "my" accomplishments. Also, I was on the national executive committee for a number of years, so some of these projects spanned most of that time. When I was national president, Canstruction® took on a life as a foundation. That can be attributed to the late Cheri Mellilo's passion for the project (which was started in Seattle, by the way). We changed the [organization's] name to Society of Design Administration (it was Society of Architectural Administrators for several years), and I developed the red and black logo—a small thing that went a long way to establishing our brand. Piccola Randolph and others worked on the academic curriculum. Brenda Richards and others worked hard on the *Design Firm Handbook*, which was published a year or so after I was president.

I was only president of the Seattle chapter one time. During that time we presented the Design Firm Overview seminar series (a huge undertaking) and a number of other seminars. I

(Continued on page 8)

Successful Delegation—Don't Forget the Level of Authority

Why delegate when you can easily do it yourself? Great managers know that delegating is better in the long run: It frees up your time for tasks that require your skills; it allows you to work on strategic planning and development; it allows you time to support and manage your staff; and it allows others to develop and grow their skills.

Delegation isn't just handing over a task to another person and telling them you need it done tomorrow. It takes a bit of upfront planning to hand over a task to someone. In order for the delegation to be successful, not only does the right person need to be selected for the job (the person with the skills to do the job), you also need to clearly identify:

- The end product that is expected
- The deadline for completion
- The resources that are available
- The type of monitoring that will be done to determine how the work is progressing
- The schedule for the monitoring

- The authority level allowed
- It's the authority level that some delegators forget to consider in the planning stage. The authority you delegate completes the scope of work for the person doing the work; he/she will also know your expectation for moving forward.

Levels of Authority

1. You get the facts, and I will make the decision.
2. You suggest alternatives, and I will make the decision.
3. You recommend an alternative, and I will make the decision.
4. You make the decision, but wait for my approval.
5. You make the decision and act on it, unless I say no.
6. You take action, and report the results to me.
7. You take action, and report to me only if unsuccessful.
8. You take action, and you do not have to report anything to me.

When deciding the level of authority, take into account

the person doing the job, think about your own delegation style, and consider the established, or lack of, trust and confidence between you and the person you are delegating tasks.

- Are you delegating to someone with whom you've worked with before and trust them to do the job as expected? If so, authority levels 4 through 8 are more empowering for staff.
- Are you delegating to a summer intern or to someone with very little work experience? Authority levels 1 through 3 would be the best approach.
- As a delegator, do you still have a hard time of letting go? You probably prefer authority level 1, but consider the positive impact you can have on your staff. Learn to let go, and at a minimum, make the decision to go with authority levels 2 or 3. Doing so will help the

person feel more like a team member, instead of just the person who did the work and had to hand it back to the boss.

"With a gameplan and a goal, and the artful skill of delegation, you'll be able to get things done." (Bobbie Staten)

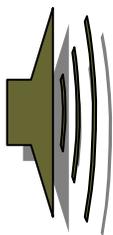
The eight levels of authority are from notes taken at the "Sure, Like I've Got All Day!" seminar presented at SDA's 2000 national convention in Philadelphia, by speaker Bobbie Staten (bobbiestaten.com). Other resources on delegating:

"The Five Leadership Competencies." Sandy Blaha and David Rippee, 2009 (click here for website).

"Is the Rookie Ready?" Sarah Green, Michael Schrage, Carol A. Walker, and Paul Muller, Harvard Business Review, December 2009.

"It's okay to be the boss. The step-by-step guide to becoming the manager your employees need." Bruce Tulgan, HarperCollins, 2007.

Sound Bites



A successful presentation is not about "Ha! I never had to check my notes," but "Wow! I really made a human connection® with my audience." (Judy Straalsund, Freedom Finder, Graceworks, Portland, Oregon, graceworksinc.com)

More on Managing Staff—Nine Pitfalls

After we published the article “Best Practices for Transitioning from Staff to Manager” (Summer 2013), we noticed others talking about the same thing (for example, National Seminars is advertising a session on “Top 10 Management Survival Skills for First-time Supervisors”); it’s a hot topic. We liked management coach Cheri Baker’s article, “The Nine Pitfalls of New Managers.” She offers nine “don’t do this if you are managing staff” directives.

Pitfall One: Creating Perceptions of Favoritism.

This pitfall is particularly dangerous if you are now supervising people that you used to work with. As soon as your employees decide that you like certain people and you don’t like others, it is the kiss of death for your effectiveness.

Pitfall Two: Getting Visibly Upset. Yes, you will get frustrated early on in your supervisory role and I’m not asking you to be a robot. Nor am I suggesting that you will give up your humanity or your vulnerability - you’ll need both! However, accept that you may get angry and

frustrated when you are a supervisor, and that you’ll need to put a lock on demonstrating those feelings for a while.

Pitfall Three: Venting or Listening in to Venting.

In the old days you could confide in a coworker when you needed to vent. You could grab a friend and talk about the meeting, your annoying officemate, or the latest company policy. As an employee, it was OK to vent from time to time. As a supervisor, you can still vent, but you’d better make sure you’re venting to another supervisor.

Pitfall Four: Relying on Your Experience of Other Supervisors:

When you become a supervisor, you are probably going to be tempted to act like your former supervisors did. When something happens, you will search your memory banks and say “how did Jane handle this?” as a point of reference. While this is normal, keep in mind that your former manager Jane may have been an ineffective supervisor. When you’re looking to do something you have not had experience

with, ask a trusted resource.

Pitfall Five: Being Bossy.

You may be the boss, but keep in mind the most effective bosses listen to their employees . . . by using the brains of everyone in the room, you’ll make better decisions. There is a difference between being decisive and being bossy.

Pitfall Six: Not Clarifying your Expectations.

If you have not been clear with your staff about what your expectations are for them, they have no reason to meet them.

Pitfall Seven: Using a Hammer when a Nudge Will Do.

Consult with your boss and your HR person about how to handle performance issues. Remember that as a new manager you’re flying blind, and that by using a hammer when a nudge will do, you may damage the relationship. Disciplinary action is like a hammer - it is powerful and gets people’s attention. As a new supervisor, keep the hammer under glass, and ask for instructions when you think you want to use it.

Pitfall Eight: Being Afraid to Say No. As a supervisor you’ll find yourself managing scarce resources; money, people, and time. Don’t be afraid to point out that prioritizing one thing may harm another.

Pitfall Nine: Giving Up Your Personal Life.

Leadership by design requires sacrifice, and often what you will be sacrificing is your time and energy. It is entirely normal for your first 3-6 months as a supervisor to involve extra hours because you’re learning and catching up; but it is also unhealthy for you to let your job consume your life.

Excerpt reprinted by permission. Cheri Baker is a management coach and trainer, and the owner of Emergence Consulting in Seattle (425-296-7340, cheri@emergenceconsulting.net). The full title of Cheri’s article ends with “And How to Avoid Them!” If you want to read the entire article, including Cheri’s tips for getting around or preventing the nine pitfalls, visit her website ([click here](#)).

Question of the Quarter: Creating a more efficient workplace

If you could change one thing to create a more efficient workplace, what would you do?

Roller skates! Seriously, we have concrete floors and if I thought I could pull it off without killing myself or looking completely ridiculous, I might give it a try. Just think how quickly I could hunt down people who didn't do their timesheets. (**Chardie Byrne**, Swenson Say Faget)

Get another computer monitor to make comparing data easier. (**Rena Howard**, **CDFA**; Watching the Bottom Line)

Create an office-wide Outlook-based calendar that has more features than the old Public Folders calendar, yet takes less management than our current option. (**Cass Salzwedel**, Gustafson Guthrie Nichol)

Since the "brain-sync" device between the Principals and me doesn't seem to be available, I'd have to start with implementing an

information management system for both project information and practice information. Collectively, we spend many hours a week simply looking for information, files, contact numbers, etc. Having a more standardized system - one that everyone is willing (even eager) to use - would be incredible and would have a significant impact on our operation. (**Gretchen Renz**, **CDFA**; Bernardo-Wills Architects)

I'd move the coffee maker closer to my office. (**Carrie Thompson**, Studio Meng Strazzara)

I tend to see things that need to be changed within our admin group that could make the workplace, as a whole, more efficient. I would make our admin group have less redundancies and our specific roles be more clear to each other and to the rest of the office. It's good we have some overlap of skills and roles because it gives us

the ability to jump in and help other staff. The disadvantage is that sometimes we are redundant with our efforts and two or three people might be working on the same task without knowing others are (when the task should only take one person). The other issue the lack of clarity in roles creates is that it's sometimes unclear who has responsibility for certain things. As a result, sometimes things fall through the cracks. (**Anonymous**)

All admins would have the same versions of Adobe Acrobat Pro and Visio; no exceptions. (**Judy Beebe**, **CDFA**; Parsons Brinckerhoff)

Create an intranet site. I know larger firms have them to help centralize corporate information for multiple offices. For our small office, I would like just a simple version where staff can easily find forms, standards, templates, procedures and "how-tos," agency info,

project info, etc. Most staff know where to look in our electronic directories, but a visually-friendly interface would be very helpful, especially if you don't know exactly where to look. It's on my to-do list and someday, maybe, I'll get to it. (**Laura Preftes**, LPD Engineering)

I would make sure all employees print double-sided. We go through lots of paper, so it would make a difference. Also, using rechargeable batteries for their cameras. There is a great deal of resistance to using them. We go through a scary amount of AA batteries every month. (**Sarah Garvis**, Wetherholt and Associates)

Reconfigure our floor plan to allow for more interaction and collaboration in the office. (**Pakalana Patterson**, **CDFA**; BHC Consultants)

Find time to set up a better filing system, and review old records to see what to get rid of. (**Lois Diemert**, **CDFA**; Jacobs)

Gmail's Love-hate Relationship

Looks like Google has upset a few users with its new Primary, Social, and Promotions tab. Instead of the user deciding where to organize incoming mail (really, how many e-mail users are *that* organized when it comes to their in-box?), the system will classify messages based on whether it thinks they are promotions (aka spam?) or not. Users can help Gmail with those decisions, or users can turn off the filtering option and continue on as they have before. To turn off filtering, select "Settings," click on the "Inbox" tab and "Unselect" all categories except for "Primary," then click "Save Changes." There's an interesting take on this, published in *The Washington Post*. [Click here](#).

**Board of Directors
SDA Seattle Chapter
2013 - 2014**

Stacy Rowland, CDFA
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Rena Howard, CDFA
Vice President

Pakalana Patterson, CDFA
Treasurer

Lois Diemert, CDFA
Secretary

Susan Vestal, CDFA
Director

Educational Programs and Networking Opportunities

You won't want to miss these!

SEPT
19

Are You Ever Going To Retire? Speakers Christie Mueller and Kris Gulbran (New York Life) will help you figure out if you need to work forever.

OCT
17

Wining, Dining, and Teeing-off. Jon Davies (Director of Client Services, BHC Consultants) shares best practices for developing and maintaining clients, and strategies for learning what projects are on the horizon before advertisement.

NOV
21

Microsoft Word. Dorothy Skans (Parsons Brinckerhoff) returns to share more tips and tricks (topics to be determined).

DEC
TBD

45th Anniversary Chapter Celebration. Seeking Task Force members. Contact stacyr@bergerpartnership.com or 206-325-6877.

Check our website for more details (sda-seattle.org). Chapter events are also published in the *Puget Sound Business Journal*, *AIA eNews*, *Seattle P-I*, and the *Daily Journal of Commerce*. For questions about any of the chapter programs, or if you have suggestions for SDA programs, please contact Rena Howard (renahowardbookkeeper@gmail.com).

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.

Look, click, learn.

Seattle Chapter SDA:

www.sda-seattle.org



National SDA:

www.sdadmin.org

Portico is published quarterly. Please send comments, suggestions, announcements and articles to Judy Beebe, Editor, at beebe@pbworld.com.

Not an SDA member?



Check this out!

New members joining the Seattle Chapter SDA in October 2013 get 15 membership months for the price of 12, plus a coupon to attend, at no cost, one monthly Seattle Chapter program.

That's a **36% savings** off your first year's membership! And there's more value—you may use the coupon any month from November 2013 to May 2014.

Check out the member benefits at www.sdadmin.org.

Member Profiles (continued from page 4)

served concurrently as the national Education Chair.

We've missed you at the chapter level. What have you been doing since you retired from the industry?

Terry: I've missed all of you as well. I get the chapter newsletter periodically, and I think about showing up for an event or meeting, but I am not sure how many people in the Seattle chapter would even know or remember me. I never hear any news from national [*SDA headquarters is pleased to report it has resolved this issue*], except through Facebook posts by a few people still involved nationally. I left the industry in June of 2004 and since then have been working for myself. I am now part-time Executive Director for Rainier Chorale and Rainier Choral Arts, an outstanding auditioned choir in South King County. For the last 11 years, I've built an active direct sales business (I'm a consultant for Stampin' Up—which is rubber stamping, scrapbooking, and home crafts/décor), plus I teach private music lessons (voice and flute). I perform as a soloist for concerts, and weddings, etc. I do a fair amount of volunteer work for my church. My kids have both graduated from high school; one is done with college and the other is in his junior year. They are both living at home.