



# Portico

*“Summer afternoon—summer afternoon; to me those have always been the two most beautiful words in the English language.”*

*~ Henry James*



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## Focus on: Project Admin EDSymposium16

The content of this edition of Portico focuses on project administration and features articles about project closeout and giving your clients kudos.

We also feature lots of chapter news in this issue, including our awards season recap, news from EDSymposium16, and upcoming events.

Learn about a super easy online scheduling tool on page 6, and test your ability to select the right word on page 9.

Also included throughout this edition are our usual Sound Bite and Quick Tips features.

Portico makes great beach reading!

## Are You a True Leader?

by Judy Beebe, CDFA

***“You can’t effectively lead (influence) others if you can’t lead (influence) yourself first” –Bob Pautke***

I love those surveys that are designed to help you discover your inner being—your personality, or character, or strengths, or work style. So imagine my delight when I registered for the Leadership Workshop that preceded the start of EDSymposium16. (Yay—another survey!) Our pre-assignment was to complete the survey and bring the results with us to the workshop.

This was not your average survey. It resulted in classification of your 24 character strengths and virtues. Broken down further, of those 24 you have *signature* strengths, *middle* strengths, and *lesser* strengths.

Your signature strengths are basically who you are. Those who know you well would agree that those strengths are you. Your middle strengths are important, but they might be situational, rather than the ones you express mostly throughout your life. Your lesser strengths don't occur as naturally as your other strengths, and you might feel like you have to work hard to use your lesser strengths.

At the workshop, Bob Pautke (of SOAR with Purpose) walked us through leadership behaviors demonstrated by those involved in the 1960s Race to the Moon effort. Based on “The Five Practices of Exemplary Leadership Model” (by Jim Kouzes and Barry Posner), Pautke showed us how those leading the race to the moon in the 1960s:

- Modeled the way
- Inspired a shared vision
- Challenged the process
- Enabled others to act
- Encouraged the heart

To set the stage, we learned that:

- Leadership is influence
- Leadership is not genetic or anointed
- Leadership is observable behaviors

We also learned there are two flawed assumptions:

1. That each person can learn to be competent in almost anything
2. That each person's greatest room for growth is in his/her areas of greatest weakness

According to Pautke, “You can be a lot more of who you already are. Leverage your strengths—mitigate lesser strengths.”

You've probably experienced that second flawed assumption at some point in your life, perhaps during your performance evaluations when you hear, “You're not very strong in (fill in the skill level here), and so you should practice/get more experience in (skill) so you can be better at (skill).” But, what if the skill you needed to get better at was number-crunching when in fact, you were more of a word person than a number person? If you don't have a natural capacity (comes easy to you) for processing numbers, what do you think your chances are of actually getting stronger at number-crunching (and why would you even want to stay in the number-crunching department at your firm)?

*Continued on page 3*

Continued from page 2

On the other hand, if your natural capacity (your strength) was words (writing), think how much more easily you could leverage that strength by helping the marketing department (for example) write proposals or content for the company's website or blog. It's all about leveraging your strengths. Put more effort into being who you already are (your signature strengths). So . . . what do you need to do to be a true leader?

- Know yourself, inside and out. Know your signature strengths, your middle strengths, your lesser strengths.
- Learn to flex your strengths.
- Act—behave—like a leader in all that you do.

Follow Pautke's SOAR approach. Ask yourself his questions, and then behave the way a leader would.

- **S**elf-worth (who am I?). Your leader behavior is to model the way.
- **O**rient direction (where should I head?). Your leader behavior is to inspire a shared vision.
- **A**uthentic actions (what must I do?). Your leader behavior is to challenge the process and enable others to act.
- **R**elevancy (how am I doing?). Your leader behavior is to encourage the heart.

When you SOAR, soar with your strengths in all aspects of your life: @ home, @ work, @ community.

My top five signature strengths:

1. Appreciation of beauty and excellence
2. Humor
3. Love of Learning
4. Teamwork
5. Love

I happen to think those fit me to a tee, although I was surprised that love of learning wasn't my Number 1. According to my full survey report (an added bonus for those that attended the workshop), "Pursuit of knowledge is more fun and engaging for you than for others with less of this strength." And, "For example, you generate strategies for approaching content to be learned and rethink these strategies on the basis of obstacles that come up."

Are you interested in knowing what your character strengths are? Get the free character survey from VIA Institute on Character at [www.viacharacter.org](http://www.viacharacter.org). When you're finished, I'd love to know your top five characteristics; please drop me a line at [beebe@pbworld.com](mailto:beebe@pbworld.com).\*

***"Ethical, effective leadership is having the moral courage and character that inspires self and others to achieve a noble vision" –Bob Pautke***

Looking for more inspiration? View the videos that Pautke played at the Leadership Workshop:

- Even Eagles Need a Push, by David McNally: <http://tinyurl.com/znmswkk>
- Leadership Lessons From a Dancing Guy, by Derek Sivers: <http://tinyurl.com/go2v7lu>

\*Editor's Note: I took Judy up on her suggestion and took the character survey. My top five signature strengths are: Spirituality, Love of Learning, Creativity, Humor, Gratitude. Take the survey and submit your results to Judy at [beebe@pbworld.com](mailto:beebe@pbworld.com) and me at [grenz@bwarch.com](mailto:grenz@bwarch.com). Results will be published in a future edition of Portico.

### Take a break from your phone: 3 tips

You're not alone if you find yourself needing to "digitally detox" and come up with creative ways to ban digital devices from parts of your life. Caroline Tell, *The New York Times*, came up with a few ways to do it.

- Play "phone stack" when eating out. Everyone places their phones in the middle of the table and whoever looks at their device before the check arrives picks up the tab.
- Ditch your phone when you get home from work. Toss it in a container (empty can, fishbowl, etc.) in a central location as soon as you walk in the door and set limits on when you can use it.
- Ban digital devices from the bedroom. No need for buzzing gizmos to keep you from a good night's sleep.

### At a networking event, pin your name tag near your right shoulder.

That way, when you shake hands, other people can glance unobtrusively at your name because it is in their line of sight.

### Show you're decisive.

Even if you're not inclined to make snap decisions, act as if you're ready to call the shots. Don't equivocate in public. If you're unsure what to do, find time alone to analyze the situation. Bosses and subordinates should see you as decisive and confident, not pained or tortured.

## President's Message

*You must do the thing you think you cannot do.*

– Eleanor Roosevelt

People get involved in organizations for a lot of reasons.

I had two big ones when I joined SDA in July 2012:

1. I wanted to be with and learn from people in similar positions in other A/E firms, and
2. I figured “what the hell.”

Seriously—I was out of excuses and it was time to take charge of my own career. I first learned about SDA from my boss when he hired me in 1998. I attended a meeting or two, but it just didn't click—for a variety of reasons.

I was young (25), with three small children. My husband was a stay-at-home-dad and we were barely making ends meet. This was my first job with an architect's office, and I was in way over my head. I was a college drop-out. I barely knew Excel, or Word. And I was, quite honestly, reluctant to stretch myself any thinner than I already was.

But one thing I learned pretty quickly is that once you are on SDA's list, you are on the list. I continued to get periodic notices and SDA stayed on my radar.

Time went by; I went back to school and got my bachelor's degree in business management. The kids grew up; my husband got a new job. My company grew. My parents passed away.

I turned 40.

And I began to realize that I needed to re-evaluate who I was and what I was working for. Somewhere along the way I'd gone from a soccer mom to a career admin—but I started to really feel how alone admins are in an office.

Enter: SDA

I don't remember what it was that made me pull the trigger almost four years ago; it might have been something about CANstruction. I just know that it felt right. And that first year I learned so much, and met such wonderfully inspiring people that I knew I had made the right choice.

And then, soon into my second year, the Nomination Committee called me. Join the board, they said. It will be fun, they said.

It's an understatement to say I was hesitant. I'd never been on a Board before. I had no idea what the rules were, what bylaws were.

But I jumped right in and agreed to be Secretary. **Do the thing you think you cannot do.**

I survived that initial Board position and learned so much, and sure enough, the Nomination Committee called me again the next year. What is that about no good deed goes unpunished?

Now it's time for me to guide our Chapter along a path that has been well-established. I want you to know that I am here for each of you, to help our Chapter continue to grow and to help our members to find what they need. I believe firmly in the educational opportunities we bring to our members.

I thank you for your support, and encourage you: when the Nomination Committee calls, considering saying yes. We learn the most when we are pushed from our comfort circle.

*Carrie Thompson, CDFI*



## Four Reasons to Give Kudos to Your Clients

PSMJ e-Cast

PSMJ seminar facilitator Alan Bollinger was telling participants what to do when the client tells you what an outstanding job you have done. Of course, Alan suggested to respond to the client by asking, “Would you mind putting that in writing on your letterhead? Coming from you it would be very valuable in our personal portfolio.”

A participant followed up and asked, “Had anyone ever written a letter to the client expressing what a great client they were, and what it was that made them great to work with?”

PSMJ thinks this is a fabulous idea for a number of reasons:

- It shows professional appreciation.
- It helps strengthen a client relationship.
- It gives your client something to show to their boss, therefore making them look good.
- It opens the door for possible feedback on your performance.



## Chapter Awards

### Star Award, 2016

Once you've made it to the top as the national SDA president, you would think you could rest a bit easier afterwards, and not have to put so much time and effort into staying active in the organization. Because you've been there, done that, right? That's not the case with Seattle chapter member, **Stacy Rowland, CDFA**. She hasn't taken a day off since she served as the national president in 2005. She continues to volunteer for chapter board positions and committee positions, and we know we can count on her to lend a hand when asked. Not that she's ready to retire, but when she does, this year alone sums up her never-ending commitment, dedication, and participation to the Seattle Chapter: She is the Certification Chair. She is a member of the Education Committee. She provides the nametags at chapter events. She is a consistent attendee at chapter events. All that, and she still finds time to serve on the national Certification Committee.

**Stacy Rowland is our chapter's 2016 shining star!**



### Above and Beyond Awards

The Seattle Chapter recognized two members at our May 19, 2016 meeting for going Above and Beyond for the chapter this year.

**Rena Howard, CDFA** was recognized for opening her home to SDA Executive Director, Stephanie Kirschner, during her stay in Seattle for BusinessTRAK.

**Kathy Milano** was recognized for suggesting the successful Java Jumpstart recruitment idea which sparked networking, membership increase, and fun.



Rena Howard, CDFA



Kathy Milano

### ROSE Award

The ROSE Award is intended to recognize a Seattle Chapter member who has had a significant positive impact on the chapter. From the standpoint of practical benefit, almost no one in the chapter has been as effective as **Pakalana Patterson, CDFA** and her management and distribution of Jobline. It is a significant source of non-dues income for the chapter, adding as much as \$1,000 per year to our coffers.

Although she no longer holds a position on the Board of Directors and could have easily stepped down from this responsibility, Pakalana has willingly and cheerfully compiled and distributed the Jobline updates several times per month. She is a professional and positive ambassador for SDA Seattle to the companies that use the service.

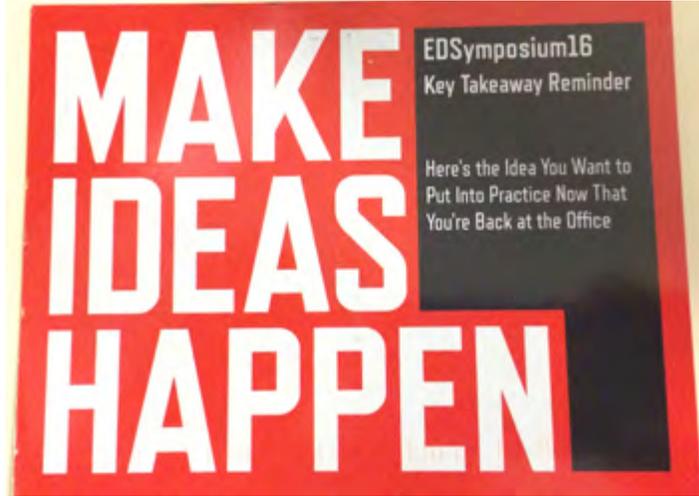


### National Recognition for Our Chapter

At the EDSymposium16 Awards Banquet, the Seattle chapter was recognized by SDA National President, Natalie Newman, for "exceptional leadership" for our hosting of BusinessTRAK in Seattle. We were commended for advancing the visibility of SDA, fostering a good working relationship with AIA Seattle, and making SDA a "respected influence in the design community."



### EDSymposium 2016: Make Ideas Happen!



One of the neat features at EDSymposium this year was the “Make Ideas Happen” postcards that were available at the training sessions. Attendees could use the cards to jot down key points or take-aways from the session, add their name and mailing address, and give them to SDA Executive Director, Stephanie Kirschner, who dropped them in the mail after the conference was over. Seven to ten days after the conference was over, attendees received a built-in reminder of what they learned, thought was important, or wanted to implement.

Some of the items that SDA Seattle Chapter attendees jotted down:

- 20-20-20 Rule: Every 20 minutes, look at something 20’ away for 20 seconds. Bonus points for getting 20 steps away from the computer. (From the Work/Life Balance Session)
- Focus on what you do well, if only for 30 minutes a day.
- “There are no victims, only volunteers.” (From the “You Don’t Have to Go Home Exhausted” session)

### Doodle.com - Simplified Scheduling

If you’ve ever spent any time playing email ping-pong to arrange a time for a meeting with multiple attendees, you will weep with joy after you use Doodle.com. The basic version is FREE and requires no registration by you as the meeting organizer or any of your attendees. Simply create a poll listing possible meeting dates and times, send a link to your attendees, and they will respond to the poll indicating their available times. You will quickly be able to see the best time, close the poll, and send a calendar link to attendees.

June 29, 2016					
	9:00	11:00	2:00	4:00	8:00
Tom		✓		✓	
Paula	✓	✓	✓		✓
Chris		✓		✓	✓
	<input type="checkbox"/>				



### Seattle Chapter Well Represented at EDSymposium16

Congratulations to our chapter scholarship winners Shannon Soady and Judy Beebe!

Seattle chapter members who attended EDSymposium 2016 in Cincinnati pictured here (l to r):

- President, Carrie Thompson, CDFA
- Shannon Soady, CDFA
- Carol Wanda Spradlin
- Judy Beebe, CDFA
- Stacy Rowland, CDFA

## Chapter News

### Welcome New Members

A warm SDA Seattle welcome to new members **Margaret Tyson** of Schemata Workshop, **Lisa Hodges** of Harbor Engineers, **Karyn Marks** of Studio Meng Strazzera, and **Alem-nesh Teshome** of Jimale Technical Services. We look forward to getting to know you.

### New Chapter Board Installed

The 2016 - 2017 chapter Board of Directors was installed by **Stacy Rowland, CDFA**, at the May 19, 2016, Business Practice Dinner. The new Board members are:

- President: Carrie Thompson, CDFA  
Studio Meng Strazzara
- President-Elect: Judy Beebe, CDFA  
WSP | Parsons Brinckerhoff
- Secretary: Gretchen Renz, CDFA  
Bernardo | Wills Architects
- Treasurer: Kurt Wong, CDFA  
NK Architects
- Directors: Carol Wanda Spradlin  
WSP | Parsons Brinckerhoff  
Renae Howard, CDFA  
Watching the Bottom Line, Inc.
- Past-President: Shannon Soady, CDFA  
DLR Group

Many thanks to our outgoing Board members for your service to SDA. **Kathy Milao** and **Crystal Ray**, we will miss your leadership and insights on the Board.

### A Reminder to Members

If you want to access the members-only content on our website (and you will, because it is such good stuff!), you must first register as a user under the "Members Only" menu. Updated content includes video of President Carrie Thompson's incoming speech from the May 19, 2016 installation ceremony, new gallery photos from EDSymposium, and video from the EDSymposium panel discussion "How to Leverage Firm Administrators in the Project Management Process."

### Join our Mailing List!



## Upcoming Events

JUNE						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

July 11, 10:00a to 4:00p: Board of Directors Planning Retreat - Part 1. Studio Meng Strazzara.

JULY						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

July 16, 10:00a to 4:00p: Board of Directors' Planning Retreat - Part 2, Studio Meng Strazzara.

July 19 noon to 1:00p: Quarterly Town Hall Conference Call. For SDA members only. See [sdanational.org](http://sdanational.org) to register for the dial-in number and conference code.

July 26, 11:00a to noon: Webinar - Hiring Do's and Don'ts. WSP|Parsons Brinckerhoff. Free to Seattle members. See [sda-seattle.org](http://sda-seattle.org) for more details

AUGUST						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

August 23, 7:30a to 9:00a: Business Practice Breakfast - The New Overtime Rules. Crowne Plaza Hotel, Seattle. See [sda-seattle.org](http://sda-seattle.org) for more information and to register.

SEPTEMBER						
S	M	T	W	T	F	S
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4	5	6	7	8	9	10
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18	19	20	21	22	23	24
25	26	27	28	29	30	

Sept. 6, 12:30p to 1:30p: Board of Directors Meeting. Studio Meng Strazzara.

Sept. 15, 5:30p to 8:00p: Business Practice Dinner - Cloud Computing. Crowne Plaza Hotel, Seattle. See [sda-seattle.org](http://sda-seattle.org) for more information and to register.

## Nine Steps to Effective Project Closeout

*Adapted from PSMJ.com*

You can distinguish yourself from the competition by following through on a project, just as you would with an excellent golf swing. Putting the finish on a job can be its defining moment. On the other hand, if everything has gone fine but something falls short at the end, you, your principal, and the client are left with a sour taste.

Go the extra mile. "Finished" doesn't mean 90 percent, or 98 percent, or 99 percent. It means 100 percent, with a couple of extra percentage points thrown in. Give both your client and your firm something sweet to remember you by. Here's a 9-step guide to effective project closeout and completion:

1. Follow your firm's policies for backing up all important files, including drawings, calculations, important meeting notes, specifications and cost estimates. Archiving on the project server isn't enough. Make at least one copy of the backup information, and store the copy in a different place.
2. Make sure you have an archivable set of final stamped drawings.
3. Double-check the final invoice to make sure that no money is owed on the project. If there is, be sure to send the client an invoice for the balance due. If the project is for the government and includes retainage, make sure you've kept a solid paper trail. Otherwise, the retainage can be extremely difficult to collect.
4. Write a summary of the project, including lessons learned. Include both good points and bad points, especially as they relate to project management, financial performance, and client satisfaction.
5. Get debriefed by the client. Did you perform satisfactorily? What else could your firm have done to make the client more satisfied? Keep a written record of the debriefing.
6. Plan for future marketing. Not every project will be photographed by a professional, so take some pictures of the final project. If it is a study, write a marketing-oriented, one-page description of the job. When the construction finishes, get detailed information about actual vs. estimated costs, number of change orders, and overall ability of the contractor to perform the work according to plans and specifications. For all constructed projects, prepare a one-page summary with this information and bullet points emphasizing unique aspects of the job that the marketing department can use to craft the project description.
7. Get the owner's permission to use the project as a reference. Add to the project file the names of important players, including the owner's representative, the contractor's superintendent, the construction manager, and the prime consultant's representative (if you were a subconsultant).
8. Evaluate the details of personnel performance. What were the strengths and weaknesses of team members? Did anyone go beyond the call of duty? Have a little party to celebrate the end of the job, and give a suitable reward to the outstanding team members.
9. Summarize any job problems that might lead to future litigation. Just because you've completed your work does not mean you won't see a damage claim later. Make sure to document the basis of all your crucial decisions, in case they are questioned after the fact. Your documentation is critically important in defending your firm against professional liability claims.

### Prevent Temperature Conflicts

Surprisingly, one of the biggest battles you'll face in the workplace involves disagreements over room temperature. According to a Career-Builder study, a full 20% of employees have argued with a co-worker about the office temperature. Employee discomfort has ramifications: 53% said working in an office that is too cold hurt their productivity and 71% said a too-warm work environment did the same.

With summer beginning, you can expect the battle of the thermostat to heat up. Take these steps to minimize the problem:

- Evaluate your space. Are windows properly sealed, do AC units cool the entire building, do some vents push out more air than others? Work with your maintenance department to fix any problems.
- Move workstations if possible. Chronically cold employees who sit under vents could switch work areas with employees who consistently complain about the heat. If they are unwilling to make the switch, explain that you don't want to hear further complaints about the temperature because they rejected a solution.
- Over the course of a week or so, tweak the temperature until you find a setting everyone can live with. If one or two people continue to complain, offer other suggestions, such as bringing in a sweater or desk fan.

**Looking for a way to thank and recognize an employee's effort**

that will get the biggest bang for your buck? Send a gift basket (chocolates, coffee, tea, fruits, wine, etc.) to the employee's house. A gift basket— along with a “your efforts are truly appreciated” note—that is seen by, and shared with, the recipient's spouse and family will have a much greater impact and appreciation than if that same basket and note was left on the employee's desk.

**Business Formal, Business Casual, Smart Casual? What does it mean?**

Find out at [skirttheceiling.com](http://skirttheceiling.com)! Skirt The Ceiling educates women entering the workforce on appropriate business attire so they spend less time mired in anxiety. #STC helps women find outfits for specific occasions so they worry less about being under-dressed or standing out.

**Give them food for thought.**

Looking to extract ideas from your staff? Try a pizza lunch for which the price of admission is a single notion to help the company. It could reveal the thoughts of employees who wouldn't normally volunteer to contribute, and it puts a fun communal spin on traditional brainstorming.

**Finding the Right Word**

**Choose the correct word in each sentence:**

1. The supervisor (advised/told) the employees that the laptops would be back-ordered.
2. Seth (intends/aims) to report the mistake.
3. Jules was (anxious/eager) for a promotion to sales director.
4. The boss told Josh that he has the (ability/capacity) to develop management skills.
5. Katie and Greg couldn't agree (between/among) themselves.
6. Barbara (continually/continuously) looks for more efficient ways to do things.
7. (Everyone/Every one) of the books had a damaged cover.

\* \* \* \* \*

1. TOLD, meaning to utter or relate, is the better choice. Advised often includes the connotation or cautioning or warning.
2. INTENDS, meaning to plan to do something, is correct. Aim means to point a weapon or to point toward some objective.
3. EAGER, meaning highly desirous of something, is correct. Anxious should be used when anxiety or worry is evoked.
4. ABILITY is correct. It means the state of being able or the power to do something. Capacity is the potential to receive or contain something.
5. BETWEEN is correct, because the statement refers to just two people. Among is used when referring to three or more people.
6. CONTINUALLY is correct. It means recurring frequently. Continuously means without interruption.
7. EVERY ONE, meaning each one, is correct. Everyone means all people.



**Sound Bite**



*“How does a project get to be a year late? . . . One day at a time.”*

*~ Frederick P. Brooks, Jr.*

## 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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## Seattle Chapter Board of Directors 2016 - 2017

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President

Judy A. Beebe, CDFA  
President-Elect

Gretchen Renz, CDFA  
Secretary

Kurt Wong, CDFA  
Treasurer

Carol Wanda Spradlin  
Director

Renae Howard, CDFA  
Director

Shannon Soady, CDFA  
Past-President

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