



Practice Management Digest

News & Best Practices from the PM Knowledge Community

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Features

Five Ways to Reduce Fees Without Jeopardizing Quality or Profitability

By Michael Strogoff, AIA

When negotiating fees, design professionals often make the mistake of reducing the scope of their services to a point that threatens the quality of their work or their profitability. Here are five ways to reduce your fees while maintaining quality and profitability.

Using Active Value Engineering for Quality Management

By Cliff Moser, AIA, MSQA

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Preserving Architectural Records for the Long-Term: A Look Ahead

By Alison Langmead, PhD

Architectural records serve as vital historical evidence for future generations of designers and scholars who wish to learn more about this country's architectural heritage. As complex design work is increasingly performed on the computer, it becomes harder to represent this work faithfully on a two-dimensional plot. Responsible architectural recordkeeping must establish systems to maintain these digital records as digital records for both the active life of the project and the long term.

Total Cost Management: A Better Way

A cost management process produces a positive outcome when it effectively aligns the demands of visionary intent, client expectations, and fiscal integrity. The method we describe here, Total Cost Management, offers an enticing byproduct: it significantly reduces the number of abortive design efforts.

News

Letter from the Chair

By Grant Armann Simpson, FAIA

Find about the PMKC AG's offerings at the AIA National Convention in Los Angeles, new AG members, a new direction for *Practice Management Digest*, alterations to the PMKC Strategic Plan, and the recently formed Practice Management Best Practices subcommittee. Also get details about A Project Delivery Skills Conference, the 2006 Practice Management Fall Conference to be held in Shreveport, La., in conjunction with the 2006 AIA Louisiana Design Conference.

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Five Ways to Reduce Fees Without Jeopardizing Quality or Profitability

When negotiating fees, design professionals often make the mistake of reducing the scope of their services to a point that threatens the quality of their work or their profitability. While some architects and engineers offer well-thought-out reductions, such as substituting performance specifications for fully detailed designs of specific building components, others blindly follow the mantra "trade scope for fees." In their zeal to reach agreement, they offer a smorgasbord of scope reductions, ranging from fewer client review meetings to reduced levels of consultant coordination. Some even suggest eliminating crucial constructability reviews or reducing their role during the construction phase, which may compromise their obligations to protect the public health, safety, and welfare.

In the end, most design professionals provide, without compensation, the very services they persuaded their clients to eliminate. They do this because 1) these services were always necessary to deliver the minimum quality level acceptable, or 2) because clients requested these services after agreements were reached and the design professionals were reluctant to request additional fees. In either case, the design professional's initial reason for eliminating these services—reaching a fee agreement while avoiding confrontation or alienating the client—is invalidated.

Here are five ways to reduce your fees and efforts to reach agreement while maintaining quality and profitability.

Redefine the deliverables

Determine which deliverables the owner, contractor, or other stakeholders don't need to meet their objectives or properly complete their work. Are three-dimensional renderings required when rough sketches or computer-generated wire frame diagrams might suffice? Are formal meeting notes necessary for all meetings or only for key decision-making meetings? Are construction phasing diagrams necessary or can the phasing be described equally effectively in the General Conditions for Construction?

Transfer tasks to the client or contractor

Identify tasks included within your proposed scope that your client could undertake with little or none of your involvement (e.g., producing meeting notes, filing environmental reports, discussing requirements with utility companies, distributing bidding documents, leading community presentations). Some clients will be delighted to complete these tasks in exchange for reduced fees. Suggest other tasks that the contractor might complete more cost-effectively than could your A/E team, such as maintaining construction logs, preparing record drawings, training maintenance staff in operating installed equipment, etc.

Transfer risk to the client

Fees that design professionals charge must reflect the degree of risk they assume—more risk requires higher fees, less risk or uncertainties warrant less fee. Although most clients and design professionals understand this concept, few bother to discuss which of a design professional's risks clients might assume in exchange for lower fees. Some clients might, for example, be willing to accept a larger share of risks associated with schedule delays, contractor deficiencies, consequential damages, and third party claims. And many design professionals would gladly accept lower fees in exchange for favorable limitation of liability provisions.

Incorporate fee allowances

Identify those tasks included within your proposed scope that may not be needed if the project proceeds smoothly and no hidden site conditions arise. These may include tasks associated with changes in design direction, additional meetings, poor contractor performance or changes in the bidding climate.

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Rather than eliminate these tasks altogether, reduce your fees and persuade the owner to include a fee allowance to fund these tasks should they become necessary. Both parties win: the initial fees are lower and funds exist should any of these tasks be required.

For example, rather than including a comprehensive evaluation of alternative HVAC systems, incorporate a single work session with the owner to present an overview of available systems and determine which is most appropriate. If the owner or engineer determines that more detailed analyses are warranted after this work session, the client can authorize additional fees at that time. Likewise, don't include exhaustive site investigations in response to possible hidden conditions or extra site observation meetings in anticipation of poor contractor performance. Simply make sure funds are allocated should these tasks become necessary.

Think outside the box

Ask yourself, "If I had to accept this fee, how could I approach the project?" Would a longer schedule allow fewer staff and less total hours? Would a simpler design or construction method require less documentation? What about developing the design on site with the client? Recall your most efficient efforts on other projects and apply any lessons learned. The possibilities are virtually endless.

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Michael Strogoff, AIA, is an AIA Practice Management Knowledge Community Advisory Group member. His firm, Strogoff Consulting in Mill Valley, Calif., provides negotiations, risk management, strategic marketing, project management, and ownership transition advice to design professionals. To inquire, visit [Strogoff Consulting](http://StrogoffConsulting.com), call 866 ARCH ENG (866-272-4364), or email Michael@StrogoffConsulting.com.





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Using Active Value Engineering for Quality Management

By Cliff Moser, AIA, MSQA

Value Engineering (VE) for Construction, often demonized as De-Value Engineering, should function as a holistic value review of a project, including design, program, site placement, materials, constructability, life-cycle costing, and environmental sustainability. If project teams do not use all the tools that VE makes available, they miss out on current analysis opportunities as well as the body of knowledge that VE represents.

What is Value Engineering?

Value Engineering was conceived as a cost and value tool during World War II by Lawrence Miles and Harry Erlicher while working at General Electric (GE). Facing wartime shortages, they developed a process for resourcing substitutes. They examined what could be used by identifying what was available, which had the unintended consequence of recommending substitutes that reduced costs and improved the product. What began as an "accident of necessity" for substitution was developed into a systematic procedure that GE soon applied to all of its products. GE described the procedure as Value Analysis (VA). As other manufacturers and industries (including the Army Corps of Engineers) adopted VA, the more active verb, engineering, became associated with it.

Value Engineering's History in Construction

Value Engineering within construction was pioneered by Mr. Alphonse Dell'Isola in the 1960s. He focused on the same goals as Miles and Erlicher in developing a value analysis process for construction. The Federal Government Construction Value Engineering Law (Public Law 104-106) can be credited to Mr. Dell'Isola. During his career, he conducted more than 1,000 VE workshops for various organizations that resulted in savings of \$2.5 billion.

Dell'Isola identifies "improving project value" as the main objective of VE. In addition to improving project value, he states that the project team should utilize VE to overcome poor project value and quality, including,

- 1) Lack of shared project information—insufficient data on the function of stakeholder requirements. This includes building materials and processes.
- 2) Lack of ideas, or failure to develop alternate solutions and then making choices based on economics and performance.
- 3) Temporary circumstances—urgent delivery, design, or schedule circumstances can force decisions that, while quick, are often incomplete without regard to value.
- 4) Honest but wrong beliefs—decisions based on what is believed to be correct rather than on facts.
- 5) Habits and attitudes—response to doing the same thing, the same way, under the same circumstances.
- 6) Changes in stakeholder requirements—new requirements may cause costs to increase without awareness.
- 7) Lack of communication and coordination—issues of communication and coordination have been determined to be reasons for unnecessary costs.
- 8) Outdated standards and specifications—VE helps isolate and focus new technologies and standards in areas where high costs with poor value may incur based on wrong or legacy information. Active VE can provide a framework for a rigorous review of project specifications (Dell'Isola, 1997).

Construction VE Today

Many VE workshops are performed as contractor-driven scope removal. In this abbreviated process, the contractor focuses only on cost removal, rather than using VE to re-evaluate and re-establish a project's goals by way of a value function review and analysis.

Design to Cost.

Architects resist an active role in costing. The fungible nature of building costs challenges designers who, in the past, have typically requested that the owner

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retain an estimator to cost the project at appropriate stages of design and documentation. If the estimate was found to be at variance with the owner's budget, the estimate was challenged, or additional monies obtained, or areas of the project shelled or removed. Once a decision was made, the design team marched-on, grumbling but immune to the coarser details of budgets. However, AIA B141-1997 fundamentally changed the design team's role in costs and budgeting. The last sentence of Section 2.1.7.1 states "if at any time the Architect's estimate of the Costs of Work exceeds the Owner's budget, the Architect shall make appropriate recommendations to the Owner to adjust the Project's size, quality or budget, and the Owner shall cooperate with the Architect in making such adjustments." The issues raised with this statement is that any 1) adjustments may be open ended, and 2) the architect may be bound to provide re-design services for free, even if the budget impacts were beyond the control of the architect.

Case for Proactive Cost Management

2.1.7.1 demands an integrated approach to project cost and design. By neglecting cost (and value) as one of the requirements of design, the architect runs the risk of attempting to defend the cost and value of the design after the project is complete. To mitigate this risk, the architect must identify and manage project value and cost.

Target Cost Modeling

Target Cost Modeling (TCM) is a process that is integrated into the project during its early phases. It matches the construction costs to design by creating a target model. As used in manufacturing, TCM is a structured approach to determine the lifecycle cost at which a product with specified functionality and quality must be produced to generate the desired level of profitability when sold at its anticipated selling price.

By estimating the built cost of a project, then subtracting its soft costs, the cost at which the project must be constructed—its target cost—can be identified. In manufacturing, successful target costing is to design the product so that it satisfies the customer and is manufactured at its target cost. In construction, successful target costing is to design and build the project so that it satisfies all customers and is built to its target cost.

Although it sounds impossible, each project should start with a target cost. In one successful hospital project in which successful TCM was employed, a project cost model was established and endorsed by all parties at the end of schematic design. Ongoing biweekly costing review and reconciliation workshops were iterated during the remaining phases to maintain the project within an endorsed cost model. If a reviewed system was shown to be designed out of variance with the cost model, the contracting, design and owner team, met to bring the system back into project scope, either by

- 1) re-analyzing the material, system, or component, as part of function analysis
- 2) reducing the product or system scope, as a result of the function analysis, or
- 3) increasing the budget available for the material, system, or component and agreeing to the added value.

This integrated model helped empower the design team as part of the costing process. Formally spectators to an arcane exercise, the TCM program integrated design as a full team member, providing a design voice to counter the construction voice. It also allowed the team, as an integrated group of designers, constructors, and owners to determine, identify and control project cost and value.

In Part 2 we'll look at new tools that can be used for value analysis of project systems and components to ensure that the best value to function is obtained.

Cliff Moser, AIA, MSQA is a principal at RTKL Associates Inc. in Los Angeles.



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Preserving Architectural Records for the Long-Term: A Look Ahead

By Alison Langmead, PhD

Project managers keep records for multiple reasons. During the process of design and construction, records take an active role in the communication and documentation of actions, transactions, and decisions. Once the project is complete, these records become a source of authentic evidence for those same actions, transactions, and decisions. For the near term, perhaps the next 15 years, this evidence will certify legal accountability for the project and serve as an important resource for project managers to rely on when making informed and effective decisions. For the much longer term, these records will serve as vital historical evidence for future generations of designers and scholars who wish to learn more about this country's architectural heritage.

The Challenge of Digital Design

Complex design work is increasingly performed on the computer, and as these digital models become more complex, it becomes harder to represent this work faithfully on a two-dimensional plot. Digital design tools no longer constitute a simple automation of the traditional hand-drafting process; they are allowing for the creation of virtual building environments in which the designer can run simulations, create virtual studies, and produce other digital transformations. While these new tools create fabulously rich design experiences, their usefulness springs directly from their digital intricacy. This intricacy, in turn, ties these records forever to their digital form. Because it is impossible to fully represent, for example, a full-motion sun study in a static two-dimensional format, authentic and complete records of the digital design process can no longer always take paper form. Therefore, responsible architectural recordkeeping must establish systems to maintain these digital records as digital records for both the active life of the project and the long term.

Establishing a Digital Records Management Program

Beginning a digital records management program does not have to be expensive, nor does it have to be implemented in a giant, sweeping gesture that fundamentally changes the existing design workflow. What is important is to begin thinking about the future of your digital project records right now. Whether you are a sole practitioner or a project manager working in a large firm, here are a few ways to begin:

Identify, arrange, and collect the digital files that serve as record documentation for your project. Give some thought to which of your computer files actually serve as evidence of the actions, transactions, and decisions of your projects. Remember to take into consideration all of the file components of any digital model or drawing, as well as any other administrative information that was produced in digital form, such as the databases that produce project records and any born-digital correspondence, especially e-mail. Just as digital drawings can contain more information than any one plot can reproduce, the original electronic version of an e-mail contains more information than is usually found in the printed copy. Over the last decade, the courts have recognized these differences to be significant.

Store these digital records in an accessible, relatively prominent place. Once you have identified your digital records, do not simply put them onto backup tapes, CDs, or DVDs that you send off-site or put in the bottom of a drawer to be forgotten. For generations, it has been the best practice to squirrel paper records away in the coldest, darkest place possible to preserve them. However, digital records need to be stored in a place that is regularly and easily accessible, not only to test the storage medium for its readability, but also to ensure that the stored files can be opened by modern software and that users can make sense of the information. Keeping these records on hard drives devoted solely to your digital archives is one good way to approach this problem. That said, moving a duplicate copy of your digital records off-site for

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safekeeping remains a good idea. It is vital that you remember to look at all of these records—both on-site and off-site—every year and assess them for their viability.

Program Assessment

Keep in mind that the best practices for digital records management are still emergent. For the time being, you should frequently assess and reassess your entire approach to digital records management —perhaps every two to three years. If, you can still open and use the digital drawing files you created five years ago, you are on the right track. If, in 20 or 50 years, you are still able to open and use those files, you will have proof of an effective, continuous, and responsible digital records management program.

As digital architectural records become more powerful and intricate, project managers will need to have even greater control over the location and description of their documentation to ensure efficient access to accurate information, both during the design process and over time. Such needs should eventually lead to a broader, more complete system of digital records management. However, do not wait until you can implement such a system to begin tending to your digital records. Start small and allow your digital recordkeeping system to grow with your needs.

Alison Langmead, PhD, is the archivist and records manager for Moore Ruble Yudell Architects & Planners in Santa Monica, Calif. She holds a doctorate in architectural history from Columbia University and is currently completing an MLIS with a specialization in archives and digital records management at UCLA's Graduate School of Education and Information Studies.



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Total Cost Management: A Better Way

Goal

A cost management process produces a positive outcome when it effectively aligns the demands of visionary intent, client expectations, and fiscal integrity. Although each of these parameters can take on different form and purpose—programmatic requirements, iconic design, life cycle and operational integrity, sustainability aspirations, pro-forma parity, donor and fundraising goals—in the end, a successful project strikes a balance among these variables without undue compromise.

We can also measure success by the internal framework and constraints of a profitable fee structure, although this concept is argued among architecture professionals. The method we describe here, Total Cost Management (TCM), offers a key byproduct: fewer abortive design efforts.

Existing Paradigm

Typically, a cost consulting request directive outlines a series of cost-estimating milestones that mimic, in direct proportional relationship, the design submittal progression. These milestones are familiar: schematics, design development, and construction documents. Characteristically, we are asked to provide estimates as each of these design milestones are achieved.

We find this approach reactive, static, and passive. The design team provides the template, and in return, we simply inform them of the cost of their proposals. Invariably, we encounter a misalignment with budgetary constraints, and then employ some form of corrective action—usually a combination of Value Engineering and programmatic sacrifice.

This linear approach often produces untenable expense. We all know the script. The compromises are many; a diminished product is the too-frequent net effect. Although the extent of the devalued outcome varies, it is often unavoidable. Most significant is our loss of design time, energy, and ultimately, our fee.

We think there is a better way.

Total Cost Management

Generally, TCM is defined as proactive real-time and continuous engagement of cost management practices throughout the design process. Although team members may use milestone estimates, they are primarily meant to demonstrate that containment strategies have been successfully employed.

The TCM process begins with the team producing a baseline cost model that outlines the benchmark goal for the owner and design team. The model defines the objectives for each of the design components, and provides all parties with a comprehensive buy-in to a cohesive set of aspirations. The team will continually refer back to the cost model to confirm that they are meeting directives and precedence. This initial phase of the process is called the Discovery Process. The team reviews the program and program mix, massing and stacking options, site-specific conditions, quality assumptions, schedule and phasing issues, and market influences.

The TCM process must begin in earnest at the onset of the design process. Introducing this methodology at a later stage with result in diminishing returns. In conjunction with TCM, the design team and the owner will engage in an in-depth discussion to identify the inherent risk profile of the project, as every project will engender a unique set of risks. The risk profile will create a prioritization format for the TCM process that follows.

Once this list of risks is established, the team prepares a stratagem to facilitate a continual dialogue. This stratagem will be organized around the general critical path of the design timeline while emphasizing the factors

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specific to the established risk profile.

TCM creates an environment that produces continual feedback regarding cost implications and opportunities for the design team.

Ideally, the team attends biweekly meetings to flesh out the issues surrounding individual project components, brainstorm alternates, assess cost implications, encapsulate ramifications, and obtain optimal solutions. These solutions are dialed into the cost model to ensure that they are embedded in the design.

Conclusion

The concept is simple, and the resulting enhanced cost control is secure--if the commitment is in place. The team must become seamlessly integrated, and communication channels open and constant.

Two concepts are fundamental to a successful outcome: TCM must commence from the conceptual onset of the project, and team members must continually adhere to the goals established by the cost model.

Alternatively, you can follow standard practice, which is painful and expensive: waiting for bad news (while preparing milestone estimates).

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Letter from the Chair

By Grant Armann Simpson, FAIA

I have been associated with the Practice Management Advisory Group (AG) for the past 12 years, first as a speaker and later as an AG member. I have watched the group build on the incredible accomplishments of many past AG members, all now friends and too numerous to mention. It is truly an honor to present these few comments about the current state of the Practice Management Knowledge Community as seen through the eyes and under the leadership of this year's AG.

PMKC Mid-Term Report: A+

As we approach the middle of the PMKC year, AIA's National Convention in Los Angeles is upon us. As is our tradition, we are offering several Wednesday workshops and other seminars. An annual event we are particularly looking forward to is the PMKC Management Breakfast, which is scheduled for the morning of the convention's opening day, June 8, 6:45 am, event no. E12 on the [AIA PMKC Web site](#).

PMKC Advisory Group Transition

Every year the AG rotates a new member in and the past chair out. This year, Amy Yurko, AIA, 2004 Chair, moved on as our immediate past chair and Andrea Cohen Gehring, AIA, LEED AP, 2005 Chair, became chair emeritus. Both Amy and Andrea have been outstanding, creative leaders who carried the Practice Management banner in concert with the admirable tradition of past chairs.

Each year one new AG member is selected from an elite group of leaders in our profession, and each new member brings with him or her a specific body of knowledge that enables us to provide our members with focused, relevant programs. Our new member for 2006 is Michael Strogoff, AIA.

Practice Management Digest Committee

The AG has decided to move the *PM Digest* in an exciting new direction beginning this year. In the past the Chair Emeritus has been responsible for developing content and coordinating the preparation of the *PM Digest*. Last fall we began organizing a *Digest* Committee, to take on this task under direction of the AG. This year the *Digest* Committee is being directed by the 2006 Chair while the past chair coordinates the monthly AG meetings. The talented and diverse 2006 *Digest* Committee is:

Chair: Krista Becker, AIA, Moore Ruble Yudell, Santa Monica, CA
 Cliff S. Moser, AIA, RTKL Associates Inc., Los Angeles, CA
 Quintin Kittle, AIA, Perkins Eastman, Pittsburgh, PA
 Brett B. Boaz, AIA, SCB Architects, Chicago, IL
 Louis J. Garapolo, AIA, Garapolo|Maynard Architects, Oak Park, IL

This committee will reshape *PM Digest* around specific themes and present new and exciting ideas about practice management as they increase the number of issue from four to six per year by 2007.

PMKC Strategic Plan

In August 2005, the PMKC AG met at AIA Headquarters in Washington, D.C., to develop a strategic plan. Out of that meeting came a new vision for the Advisory Group:

"We want people we touch to say: I'm delighted that easy and effective access to and sharing of practice management knowledge has improved me, my practice, and my profession."

And a new mission for the Practice Management Knowledge Community:

"The Practice Management Knowledge Community's mission is to create

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delight as we endeavor to:

Connect people with each other to discover, gather, organize, and share knowledge

Innovate communities to discover, gather, organize and share knowledge

Continually build and improve knowledge resources and access to them

Create networks that discover, gather, organize, and share knowledge

Engender trust in our communities to encourage knowledge sharing

Identify individual content experts

Engender a culture that responds to members changing needs

Facilitate people's optimal use of resources and networks

Show leadership by shaping networks and change"

The strategic plan has been enthusiastically embraced by all members of the AG as well as the Institute. Our 2007 Chair, James L. Sawyer, AIA, is the primary keeper and director of the strategic planning process and will lead the PMKC's efforts next year in implementing this strategic plan.

Best Practices Committee

The AG also recently formed a Practice Management Best Practices subcommittee. The committee's initial tasks include reviewing recent AIA best practices initiatives, identifying practice management best practices topics that will provide most value to AIA members, developing guidelines for and screening best practices submittals, and recommending how best to share best practices information with the architectural community. The subcommittee's initial recommendations will be released this summer. 2008 Chair Michael Strogoff, AIA, is the prime mover and director of this committee. The 2006 Best Practices Committee is:

Amy Kerkman, AIA, Matthei and Colin Associates, Chicago, IL
Jon Luft, AIA, NCARB, Building Analysts, San Diego, CA
Kriss Pettersen, AIA, Payette, Boston, MA
Brian Scanlon, AIA, Jacobs Facilities, Arlington, VA
Michael Strogoff, AIA, Strogoff Consulting, Mill Valley, CA
Peter Winkler, AIA, MW Zander, Phoenix, AZ
Steve Wintner, AIA, Management Consulting Services, The Woodlands, TX

We will continue to develop programs that support your needs.

PMKC and AIA/Louisiana 2006 Fall Conference, Shreveport, LA

A Project Delivery Skills Conference, the 2006 Practice Management Fall Conference will be presented in Shreveport, La., September 13-16, 2006 in conjunction with the 2006 AIA Louisiana Design Conference. AIA Louisiana was not able to hold their conference in 2005 because of Hurricane Katrina. Two years of energy and enthusiasm will be in play in Shreveport this year. This conference is designed to provide instruction and discourse on the core elements of project delivery skills as they relate to project management, construction documents, and managing risks. Participants will participate in discussions, exercises, and other activities designed to enhance personal leadership and the skills required to achieve technical goals and objectives. 2009 Chair Sara McCann, AIA, is the PMKC liaison with AIA Louisiana.

PMKC Leadership Volunteers

Both the *Digest* Committee and the Best Practices Committee will rotate members similar to the AG. Every year three new members will join the PMKC leadership, and three members who have served their terms will depart. Many opportunities to participate in the PMKC leadership are available at the national level. Watch for the call for volunteers that will be out soon.

On behalf of the PMKC AG, I hope I have expressed our enthusiasm and excitement about the programs and events we are providing for our AIA members. This Knowledge Community is for you, and we will constantly adjust our programs to meet your needs. Keep in contact with us at [AIA PMKC Web site](#), and let us know how we are doing!

Regards,

*Grant Armann Simpson, FAIA
RTKL Architects
Dallas, TX
2006 Advisory Group Chair
AIA Practice Management Knowledge Community*