



Practice Management Digest

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Features

It's Not Easy Being Green

Submitted by Victor O. Schinnerer & Company Inc.

Green design criteria minimize hazardous environmental consequences and reduce energy use. Building components are used that are more efficient to make and are often renewable. And, perhaps most appealing to clients, life-cycle costs are reduced. But green design may lead to claims against design professionals. Some of the claims may not be within the scope of professional liability coverage.

Culture: Your Firm's Power Base

By Sandy Blaha

What is it that makes one office sizzle with positive energy, excitement, and innovation? What makes another tired, frustrated, and uninspired? The culture. So how do companies build a culture of success?

Strategic Planning: Know Thyself

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Selecting a Facilitator for Your Strategic Planning Retreat

By Frank A. Stasiowski, FAIA

Most design firms that have tried both internal and outside facilitators have found the presence of a well-qualified outsider is essential. Here's why.

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By Jack Reigle

Good strategy is a bridge for our current strengths to travel across to meet our future aspirations. But the real secret of implementing strategy is less about visible achievement and much more about dealing with the clash of fears and ambitions inherent in any planning team. Dealing with these belief obstacles/opportunities is the real game afoot.

Challenges and Possibilities for the Architect of the 21st Century

By Bonnie Choy, Assoc. AIA, CDT

The Practice Management Knowledge Community offered two scholarships to emerging professionals to attend the 2004 Desert Practice Conference, which took place in October. Here is one of the winning essays.

Chaos and Growth: Entering Unexplored Territory

By Bonnie Choy, Assoc. AIA, CDT

Scholarship recipient Bonnie Choy, Assoc. AIA, CDT, recounts her experiences at the 2004 Desert Practice Conference.

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It's Not Easy Being Green

Submitted by Victor O. Schinnerer & Company Inc.

Editor's Note: This article is reprinted from the March-April 2004 issue of Guidelines, with permission from Victor O. Schinnerer & Company Inc. Schinnerer is a Legacy sponsor of the AIA Practice Management Knowledge Community.

Though a "green" design is difficult to achieve, it's impossible to argue against sustainability in the design and operation of our built environment. Green design criteria minimize hazardous environmental consequences and reduce energy use. Building components are used that are more efficient to make and are often renewable. And, perhaps most appealing to clients, life-cycle costs are reduced.

Design professionals are well aware of the competition between client demands and sound design principles. Often, the client's desire to reduce initial costs, compress delivery times, and see an immediate return on investment outweighs design options and construction techniques that could reduce a project's impact on the environment. Few design firms have the expertise to assess the "encapsulated energy" in building materials or judge the long-term impact of the use of renewable or recycled materials. It has always been difficult to explain the trade-offs intrinsic to a sustainable design. Designing for the good of the environment could not be quantified.

With the creation of the U.S. Green Building Council (USGBC), the concept of sustainability became calculable. The USGBC developed requirements for environmental sustainability and resource conservation. And it created a rating system for its definition of "green" building design and construction. This system, the Leadership in Energy and Environmental Design™ (LEED™) program, is a point-driven certification of buildings that sets arbitrary values for design features, construction processes, and energy use. Many of the LEED prerequisites and credits depend upon site attributes, specific design requirements, and acceptable materials. Other criteria require compliance by the contractor.

The stated goal of the LEED system, through which LEED certification is obtained, is to distinguish building projects that have demonstrated a commitment to sustainability by meeting the "highest performance standards." Be aware that such language could be construed as a warranty standard on the design and on the performance of the design as constructed. The LEED program also includes an accreditation for design professionals. By implication, this questions the ability of nonaccredited professionals to design environmentally sensitive projects.

While the LEED program is not the only driving force for energy efficiency and sustainability, it is the most publicized. The point system drives design team composition and decisions that might not be the best design choices. Generally, clients pursue LEED certification for their buildings because they desire the outcome to be a better "product." Others, however, want to be recognized as leaders in the green building sector. They may desire the public relations value of a high LEED rating and believe the higher levels of certification means their building will have an increased market value or be able to command higher rents. Clients may encourage the green" design process, but ultimately they want a valuable end product.

From a professional liability perspective, there are many exposures generated or intensified by the LEED certification process. The accreditation and certification process may lead to claims against design professionals. Some of these may not be within the scope of professional liability coverage. Exposures include

- Unfulfilled Expectations: Passing the certification test, and thus holding oneself out as an expert without any significant experience and

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knowledge of the design principles underlying the "green" system, creates the likelihood of dissatisfied clients. Dissatisfied clients bring claims.

- **Cost Recovery:** The broad nature of the "green" rating system can serve as a trap for design professionals attempting to design to a preselected certification level. Clients expect to see the financial savings their investment is supposed to produce. Higher certification levels usually require more design effort and construction costs. If an anticipated benefit is not achieved, the firm could be expected to pay for its "mistake."
- **Implied or Express Warranties:** LEED certification implies energy savings and increased productivity. The design process, however, is interdependent on the actions of the client and can be later influenced by many factors. Projects have a final review by the USGBC after construction. That final review may change the certification level expected. As the certification levels increase from "silver" to "gold" to "platinum," expected benefits also increase. Warranties could be claimed for anything ranging from the failure to meet the certification level planned to "excessive" energy, water, or maintenance costs. Even the failure of the design to decrease employee sick leave and increase productivity could be claimed.
- **Fraud or Misrepresentation:** Although the process is supposed to take into account the "encapsulated energy" in materials, few project owners seem willing to accelerate recycling or replacement costs by increasing their initial investments. Thus, the savings in life cycle costs may be misleading. If a client does not understand this, the design professional could be accused of deceptive practices. As with all projects, design professionals need to carefully assess the risks of "green" designs. The concept of sustainability also needs to apply to the financial viability of the design firm.



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Culture: Your Firm's Power Base

By Sandy Blaha

What is it that makes one office sizzle with positive energy, excitement, and innovation? What makes another tired, frustrated, and uninspired? The culture. The most successful architecture/engineering firms pay attention to this invisible business advantage. They care for and nurture it. They recognize and talk about it. And they treat it as if it were the most valuable member of their leadership team.

Culture is an invisible organizational structure. It comprises values, mission, and the personality and vision of the founders and key leaders. Organizational culture can be defined in many ways. I think of it as the environmental operating system, the personality of the firm, the unspoken behavioral modus operandi.

So how do companies build a culture of success? It starts at the top. Are ideas, creativity, and innovative thinking encouraged by all senior leaders and present in the day-to-day work environment? Are your employees committed to providing outstanding customer service? Do they support the firm's values, purpose, and vision? And finally, do they believe in each other enough to work out differences within the team? The latter is often a crucial and missing factor.

Given the right amount of time and attention, every team—whether it is the leadership/management team or a project team—will go through four stages of development. In 1965, researcher Bruce Tuckman identified these stages as forming, storming, norming, and performing. Not until you reach the final stage, performing, will a team or firm cash in on its investment of dedication to a common cause. Leadership teams that have great listening skills, encourage self-examination and self-definition, and resolve conflict well provide a model for the continuation of a firm and the performance of its future leaders.

This is a story about two very different firms, each of which has built a culture of success and is thriving. They are firms with vision. They not only tolerate, but encourage the challenge and conflict of ideas. They listen to the conversations that are stirred up. Their leaders remain challenged and vital.

These firms pay attention to nourishing and supporting their culture, which is tangible, promoted, protected, and aligned with action. They provide excellent service to their customers. It is this type of firm, one that is able to perpetuate its culture, build next generation leaders, and adapt to changes, that will attract the best and brightest employees and will continue to be the rising star in its industry. It is this type of firm that will thrive in the future.

Rock-Solid Commitment

Boulder Associates is a 35-person architecture firm with offices in Boulder, Colo., and Sacramento, Calif. Boulder Associates consistently makes the top 10 list of financially performing architecture firms in Boulder County. It is a niche firm serving the medical industry. Boulder Associates has a key ingredient for success seen, in my experience, in one in 10 firms: leaders who exhibit the change they want in their firm.

When I met Boulder Associates in 1997, it was a 19-person firm interested in defining and implementing the next phase of development. Boulder Associates knew it had many of the right raw ingredients, but wasn't sure how to put them together to achieve the next level of success. The firm's leaders couldn't envision what that next level would look like, but they knew they wanted to develop their next generation of leaders.

Boulder Associates has four partners. They are sincere, non-pretentious, intelligent guys with a sense of humor. The oldest partner is five years from retirement, followed by a partner 10 years from retirement. The two youngest

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partners are more than 20 years from retirement. This wide span of ages is a clue to Boulder Associates' success. The firm embraces and promotes intelligence and leadership throughout the generations.

Each partner acts as principal in charge of projects and sometimes as a senior project manager. In 1997, the partners determined that to accomplish their goals as a firm, they would need to change and adapt, to let go of control, and share management and leadership. To accomplish this, the partners moved away from their roles as project management principals. Instead, they became principals in charge and identified other strong project managers. Even though they were reluctant to relinquish project control, they wanted a generation of emerging leaders and moved aside to let others learn.

The partners at this firm work as hard as everyone else—sometimes even harder. If I call their offices on the weekend, I am as likely to get a partner as a staff person. Firm leaders work side by side with their employees, living their value of "giving it your all." As a result, employees do the same.

Throughout the year I worked with this group, they never flinched when dealing with the tough issues. Several partner work sessions took place on Saturday mornings in order to achieve alignment within the principal team. The partners determined big picture issues such as qualities and behaviors of future leaders, as well as such specifics as how to reward performance. Individual members did not shy away from my observations and coaching about group or individual behavioral challenges. They were, in fact, grateful for the information.

Boulder Associates has catapulted to a higher expression of its former self. Leadership is present at all levels of the company. Associates lead implementation of strategic directives. In the three years I have known Boulder Associates, the firm has never lost an employee, other than by choice or true personal change such as divorce or relocation. Newly named associates work hard to contribute to the firm's success. Everyone provides the best to their customers. This is reflected on customer surveys; the firm receives the highest ratings. In my opinion, Boulder Associates has an unstoppable future.

Intelligence, Flexibility, Community

Now meet Civitas. Civitas grew quickly from its beginnings in 1984 under the direction of its spiritual leaders Mark Johnson and his wife Ann Mullins, the chief financial officer. The firm's source of inspiration is its staff's ideas, humor, and intellect. The source of the firm's successful culture is the idea man, Mark Johnson. He is effervescent, jubilant, and childlike in his love of ideas, projects, and innovation. He is a visionary who uses "brain dumps" to teach, motivate, and engage his employees. He has big ideas and the courage and energy to accomplish them.

Civitas experienced growing pains as it attracted employees to this dynamic environment. To move forward successfully, the firm needed to more clearly define its values, mission, and vision for the future and reorganize its operations.

Once staff members understood these needed changes, they energetically led the process to resolution within a matter of months. A vision team was formed and the firm's values, vision, and mission statements were reworked. Johnson's participation was slight at first, then more intense as he was able to put spin and polish on the group's thinking.

Johnson's goal from the start was to create a revised organizational structure that would enable Civitas to grow while honoring its creative, tribal culture—a culture that attracts and builds the best and brightest talent. The firm's expertise is in hiring intellect. Employees flock to this landscape architecture and urban planning firm. Civitas' ability to adapt individual personalities to the good of the whole is its springboard to the future. There is a language of culture at the firm that underscores this strength. The team creates definitions of itself such as the "Brazilian Soccer Team," a reflection of team spirit and success in meeting goals.

One thing I observed while working with Civitas, however, is that while the firm did a phenomenal job hiring talent, the business was being run in a way that would eventually cause burnout in employees. Growth had pushed its limits. The firm doubled in size in the last few years and is likely to double again.

We began to study the studio structure—teams organized around market

segments—as a way to protect and nurture the firm's culture and employees as the operation grows. While we were on track for the studio concept, Johnson redirected the thought process. He wanted to build an idea-responsive and flexible operation. He thought the studio structure wouldn't provide the necessary support. Johnson also wanted the structure to respond to his vision for strategic networks of people who could come together quickly and effectively around projects. The final result? A firm organized around marketing, operations, and financial management.

Points to Ponder

Boulder Associates and Civitas were able to assess their shortcomings and adapt quickly. They are led by sincere and hard-working owners. Boulder Associates has a collaborative group of multigenerational partners who inspire and inform. Civitas formed itself around ideas, intellect, and a self-defining visual language. Each firm has hired the brightest staff possible, which elevates the level of thinking, progress, and innovation. Both have modeled themselves on a dynamic vision of the future. Neither firm is founded on a business-as-usual model. Each has a sense of humor and rarely loses staff except by choice. Staff belong to this environment and are committed to the work, the firm, and each other. Each firm also relies on its owners to lead, not manage, and each actively builds its next generation of leaders. This is the competition of the future.

Forming, Storming, Norming, and Performing

In 1965, Bruce W. Tuckman hypothesized that teams go through four developmental stages during their formation, existence, and dispersal:

- Forming
- Storming
- Norming
- Performing.

These stages are sequential and developmental. A group will proceed through them only insofar as its members are willing to grow. Team cohesiveness seems to depend on how well group members can relate in the same phase at the same time. Each member must be prepared to give up something at each step to help the group move to the next stage. The timing of each will depend on the nature of the group, its members, and its leadership. Issues and concerns must be resolved in each stage before the group can move on. If the group is not able to solve its issues and concerns, the dominant behavior will become either apathy or conflict, and the group will disintegrate.

Forming

In this stage, team members rely on safe, patterned behavior and look to the group leader for guidance. Acceptance and safety are desirable. The rules of behavior: keep it simple; avoid controversy. Discussion centers around defining the scope of the task and the way to approach it.

To progress, team members must relinquish the comfort of nonthreatening topics and risk the possibility of conflict.

Storming

Storming is characterized by competition and conflict in personal relations and organization of task functions. As group members attempt to organize for the task, conflicts over leadership, structure, power, and authority arise. Questions surface about who will be responsible for what, the nature of the rules, the reward system, and the criteria for evaluation.

Individuals must bend and mold their feelings, ideas, attitudes, and beliefs to suit the group organization. Because of fear of exposure of weakness or fear of failure at tasks, there will be an increased desire for structure or for clarification and commitment to structure.

To progress, group members must move from a testing-and-proving mentality to a problem-solving mentality. The most important trait in helping groups to move to the next stage seems to be the ability to listen.

Norming

Now interpersonal relations are characterized by cohesion. Group members actively acknowledge all members' contributions, build and maintain the sense of community, and solve group issues. Team members must be willing to

change their preconceived ideas or opinions on the basis of facts presented by other members, and they must actively ask each other questions. Creativity is high. Leadership is shared, and cliques dissolve.

When members begin to know and identify with one another, the level of trust in their personal relations contributes to the development of group cohesion. Workers feel good about being part of an effective team. It is during this stage of development (assuming the group gets this far) that people begin to experience a sense of group solidarity and a feeling of catharsis at having resolved interpersonal conflicts.

The major drawback of norming stage is that members may begin to fear the inevitable future breakup of the team and may resist change of any sort.

Performing

The performing stage is not reached by all group members. If group members evolve to this stage, however, their capacity, range, and depth of personal relations expand to true interdependence. In this stage, people can work singly, in subgroups, or as a total unit with equal facility. Their roles and authorities dynamically adjust to the changing needs of the group and individuals. Performing is marked by interdependence in personal relations and by problem-solving in the realm of task functions.

By now, the group should be most productive. Individual members have become self-assured, and the need for group approval has passed. Members are highly task-oriented and highly people-oriented. There is unity: group identity is complete, group morale is high, and group loyalty is intense. The task function becomes genuine problem-solving, leading toward optimal solutions and optimal group development. There is support for experimentation in solving problems with an emphasis on achievement. The overall goal is productivity through problem-solving and work.

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Strategic Planning: Know Thyself

By Michael A. Webber, Allied AIA

Editor's note: This article was adapted from a presentation by Michael Webber, Allied AIA, at the joint 2004 AIA California Council/AIA Practice Management Knowledge Community Conference in Indian Wells, Calif.

Not all projects or clients are profitable. But it may go further than just individual projects or clients. It could be that certain project or client types are not profitable for your firm. Or the converse could be true. Certain project or client types—or projects of a certain size or in certain geographic areas—are incredibly profitable for your firm. But do you know which ones? Regardless of the project-based accounting software you use, your firm already has this information.

Net revenue is total revenue minus all direct expenses. Direct expenses include consultants, printing, testing, travel expenses directly related to a project—everything but labor. Net revenue is what remains to cover your firm's salaries, and overhead, and produce your profits.

A billing (also called net) multiplier is net revenue divided by direct labor. In other words, for every \$1 you pay someone to work on a project, how many dollars do you get? A billing multiplier can be calculated for every project.

An overhead rate is all overhead (also called indirect) expenses, including indirect labor, divided by direct labor. An OH rate is the amount of OH expenses per \$1 of direct labor. A firm's overall billing multiplier must be greater than 1 plus its OH rate in order to make a profit.

Consider a firm with \$10.5 million of net revenues. This could be the net revenues of a small or mid-size firm for two or three years, or it could be a larger firm for one year. Regardless, on these net revenues the firm realized 12.5 percent profit and a billing multiplier of almost 3.0. (Remember the old rule of thumb of 3? "If I can bill my people out three times what I pay them, we should be able to make money." It still works. And 3.00 is still the most common target multiplier in the industry.) Right there, the firm might have said, "This looks great! We are already above average. Why do we have to look any further?" Why? Because there is some interesting and strategically important information in the details behind those numbers.

Out of the numerous projects that made up this net revenues base, the firm identified seven basic project types it designs and six basic client types for whom it works. All the projects were sorted by these project and client types and total net revenues and a billing multiplier calculated for each subgroup or market segment. (Click here to see [Exhibit 1](#).)

Exhibit 1 shows the net revenues generated and billing multiplier realized from each project/client subgroup. The billing multipliers are color coded to indicate whether it is below average, about average, or above average. Subtotals and percent of total net revenues also are included for each project and client type.

By project type, the firm had a balanced basis of work, with each type accounting for about 10 percent (Project Types A and G) to 25 percent (Project Type C) of the firm's net revenues. But look at the variances among the billing multipliers—from about a 2.2 for Project Type B to more than a 4.0 for Project Type F. More on the importance of this later, but suffice it for now to say that there is a major difference in how much profit each of these project types contributed to the firm's bottom line.

By client type, about 80 percent of the firm's net revenues came from just three of these, Client Types III, IV, and V. But, again, there is a billing multiplier spread from about 2.2 for Client Type II to, again, a 4.0 for Client

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Type III. The firm earned a billing multiplier of almost 4.0 on Client Type III, from which it also realized 32 percent of its net revenues!

Let's go a step further and look at operating profit by subgroup. Yes, you can do that too. Remember that a billing multiplier has as its denominator direct labor. So does your overhead (OH) rate. This firm had an OH rate of 160 percent. Therefore, by however much the billing multiplier exceeds—or doesn't exceed—2.60 (1 + 160 percent) determines how much operating profit—or loss—the firm realized from each subgroup. Exhibit 2 has the same layout as Exhibit 1, but with operating profits instead of net revenues, and the difference between its billing multiplier and its breakeven point (1 + its OH rate) instead of the billing multiplier. (Click here for **Exhibit 2**.)

In Exhibit 2, let's look at Client Type III again. Projects from this one client type, from which the firm generated 32 percent of its business, generated more than 90 percent of the firm's operating profits! This is strategic information. Guess who I am inviting first to the next client party. Guess who I am going to develop an entire marketing plan around. Guess whose industry I am going to learn inside and out. Guess whose industry our people are going to learn inside and out. Guess whose associations I am going to join and become active in.

Let's go back to project type again. As discussed in Exhibit 1, there was a fairly even spread of net revenues from each project type. But look at Exhibit 2. Project Types C and F each generated 49 percent of the firm's operating profits, and D generated 21 percent.

But how is it possible for 49 percent + 49 percent + 21 percent to equal 119 percent? From Project Type B, the firm lost 28 percent of its operating profits—more than \$350,000. This firm had operating profits of almost \$1.3 million, but it might have made more than \$1.6 million just by breaking even on Type B projects. Similarly, there is Client Type II, whose projects lost 9 percent of the firm's operating profits, almost \$140,000. This also is strategic information.

Unfortunately, this also is where I must pause in my analysis. As a "bean counter," I cannot tell you why these losses occurred. Nor can I tell you why other segments made so much money. (Well, actually, I frequently can, at least by asking questions: Was it the fees? Was it the execution of the projects? Was it the project manager or team on the projects? Was it client or project requirements? No, that analysis has to come from managers and professional staff of the firm.)

But your bean counters can provide you with all the information needed to conduct this same type of performance review. Regardless of the accounting software you use, any project-based system keeps financial information at the project level. The question is, "Are you using it?"

The strategic part of the analysis comes from a "postmortem" review of each of the underlying projects in a "surprise" (a good or bad result) subgroup. Each individual subgroup had several individual projects underlying its results—it is usually not just one project inducing the result. The firm's managers and professional staff should be able to figure out the reasons for each and every "surprise." They know what the firm is, and is not, good at. They know where fees are difficult to negotiate. They know; they just may not realize they know.

Here are some of the strategic questions:

- At what are we financially successful? Why? With whom are we financially successful? Why?
- If financially successful, is it our design, our production, our client relations? Can we expand on this? How? Can we take advantage of this? How? What other client types have similar project needs?
- If not financially successful, why? Can we correct it, at least to the point of breaking even? How? Do we really need to provide this project type (service)? Why? Do we really need the business of those clients? Why?
- On what is our reputation based? Why? At what are we creatively good? Why? Are we financially successful at this, too? Why (or, why not)?

Can a firm just get out of a money-losing area? The answer, of course, is yes and no. As mentioned, the firm has Client Type II that provides only 7 percent of net revenues, but, from those projects, the firm lost almost \$140,000. Work for Client Type II includes three project types. One of those, Project Type B,

always underperforms, regardless of the client type. Type A projects for Client Type II essentially break even. Type D projects only underperform for Client Type II; Type D projects for Client Type IV are very profitable. Is this a new, developing client market that can be profitable? Is the firm trying to "buy" its way into this market (a dangerous strategy)? If the firm cannot see at least breaking even for this client type, at a minimum at least quit soliciting new clients of this type.

What about Project Type B? Those projects comprise almost 18 percent of the firm's business. Could (or would) a firm walk away from almost one-fifth of its business? Other project types for Client Type IV are very profitable. Other project types for Client Type V are basically breakeven. What are the reasons for the losses for this project type?

Choosing which markets to practice in is a major part of strategic planning—and a firm can choose to stay in a financially unprofitable market. That decision is up to you. It's your firm. My only message is that you already have information in your accounting system that you can use to learn and understand how and where you are doing poorly or well. My advice is just to make sure you use it in your decision making. The first step in strategic planning is "know thyself."

*Michael A. Webber, Allied AIA, was chief financial officer of a 100+ person, multioffice architecture/engineering firm and is now president of **And Managers Know Why**, a financial and operations consultant to architecture/engineering firms. He also was a member of the Planning Committee for the 2004 Practice Management Knowledge Community Conference, at which he gave this presentation. Questions may be addressed to him at mawebber@amkw.com.*



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Selecting a Facilitator for Your Strategic Planning Retreat

By Frank A. Stasiowski, FAIA

Most design firms that have tried both internal and outside facilitators have found the presence of a well-qualified outsider is essential to keep participants objective and on track. Of course, having an outside facilitator doesn't guarantee the success of your plan, but not having one can almost guarantee that you won't achieve the thorough, objective, imaginative thinking required to create an effective strategy.

Why Hire an Outside Facilitator?

Strategic planning discussions can be painful and difficult. They involve personal values and goals, deeply held beliefs about the nature of the firm and where it's going, and maybe different perspectives on the marketplace. Some principals may have values or goals that conflict with those of other key members of the firm.

All this can reduce the team's ability to take the objective, long term overview that strategic planning requires. And unless differences are dealt with carefully and openly, they can result in dissension that subverts the strategic plan.

Added to these complexities are the networks of interrelationships among people who have been working together for some time, comfortable (or uncomfortable but at least familiar) behavior patterns, and knowledge of how the firm has done business in the past. Also, some people in the session are bound to perceive that their careers depend on how they relate to some others.

An outside facilitator carries none of this baggage. He or she can look at the firm, the management team, and the planning process objectively. An outside facilitator can say things like "that's habit talking" or "you're rationalizing," and can make sure that some people don't dominate the discussion. A facilitator knows how to keep the discussion on track while taking everyone's concerns into consideration.

What Happens If You Don't Hire Someone from Outside?

Some firms try to do their strategic planning entirely with their own people. Maybe they have an executive who is known for objectivity and fairness and they invite him or her to be the facilitator.

Here's what often happens:

- Strategic discussions break down into nonstrategic, operational issues
- Participants tend to look back, into the company's history, rather than forward
- The discussion gets stuck in mundane issues and detail, as opposed to focusing on the big picture
- Participants don't engage in "out of the box" thinking
- The internal facilitator cannot facilitate fully, for several reasons
- The process doesn't result in specific action items or a way to assure the planned actions really take place.

Selecting a Facilitator

To identify the best facilitator, start with a short list of three qualified candidates. Rank the candidates based on an interview and reference checks. Criteria to evaluate the candidates should include

- An understanding of the architecture/engineering industry
- Experience with multiple architecture/engineering firms
- An ability to articulate key strategic concepts

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- An ability to provide strategic direction
- An ability and willingness to tackle "sacred cows"
- An ability to focus on strategic issues and not get bogged down in operational details
- An ability to keep the meeting moving toward a successful conclusion.

Checking References

Unless you have had previous experience with the facilitator or you trust the person who recommended the facilitator, it is essential that you check the facilitator's references. Some questions you might ask references include

- How did you like working with the facilitator?
- Would you describe the type of strategic planning that was performed for your firm?
- How many people in your firm were in the planning session?
- Did you get the results you wanted?
- If you could coach this consultant/facilitator on how to make his/her work more effective, what would you tell him or her?
- How does this facilitator compare to other facilitators you've used?
- Would you use the facilitator again?

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Practice Management Digest

News & Best Practices from the PM Knowledge Community

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Strategy versus Chaos: And the Winner is...

By Jack Reigle

Don't many of us seem to wish the world would slow down or stand still for a while so we can catch our breath? Yet, after maybe two days, the fear of inactivity or a shrinking backlog would have most of us voting for the urgency to return, chaos included. The question really becomes: what do I have to do to lead the firm down a path where chaos is productive, stimulating, and rewarding? Is there any such thing?

There is, and it's a matter of organizing around strategy that harnesses the churning uncertainties around us, and turns them into viable strategies that raise our performance higher than ever before. Good strategy is a bridge for our current strengths to travel across to meet our future aspirations. It clarifies our choices and consolidates our power to gain leverage over whatever is important in the markets we serve and within the services we provide.

Let's consider two key aspects of planning: choosing an operating model/firm identity type, and using the best approach and style of how to get the plan developed and underway.

Firm Identity

The operating models that feed a firm's identity development are fairly straightforward and understandable. The investment (or hard part) is the transition, which calls for a clear and steady hand in culling out the myriad implications, changing old habits, and putting new structures and thinking into place. These transitions can take years to fully mature.

Become an Einstein, and you'll deliver one-of-kind new ideas to clients most willing to take risk and in need of broad recognition. Become a niche expert, and you'll be doing leading-edge design work, mainly focused on one project type, traveling nationwide or throughout the world. As a market partner, you'll be immersed in two or three related markets, and be seen by your clients as a long-term source of a full range of services required to take projects from conception through construction management. Community leaders are more local or regional in terms of geography, politically well-connected, and seen as the go-to firm for much of the standard work required in the public arena. An orchestrator will be known for great strength in delivery, such as excellence in production and project management systems and skills, and you'll be working nationwide in support of the lead design firm. Finally, builders round out the identity choices. Their role is to focus on speed and cost, and they possess the highest capabilities to roll-out large volumes on a tight and predictable budget and schedule.

The clarity achieved through making a choice of identity provides the momentum required to develop and maintain a good strategy for 10 or more years. Once it's decided, the actual transition can be 12-24 months and, during that time, you're honing your market positioning message, hiring on a more targeted basis, learning to say "No, thank you" to the numerous projects that can pay the bills but don't serve to strengthen the firm or its legacy, and otherwise learning how to be disciplined in your commitment to a true strategy supported by a logical operating model that really works.

Different Approaches to Planning

Planning styles affect both the creation of the plan and the implementation environment that follows. Three styles of planning emerge from the pack:

- The Vision Plan: More traditional in its thrust, the vision plan is developed over three to four months through a series of team retreats, front-ended by survey and interview modules. Vision plans are idea- and aspiration-driven, and they require the ability to leave today

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behind to envision all the best possibilities contained within the firm's future. Market intelligence is critical to successfully developing this plan, as it demands a level of confidence about your primary markets and project types to result in full commitment. The key strength of this planning style is that it typically produces tight vision narratives required to become compelling "magnets" as we move into the future.

- The Fast Track/Just-in-Time Plan: Key characteristics of this planning approach are that the planning cycle runs longer, typically 6-12 months, and more actual strategy implementation occurs along the way toward finalizing the plan. This "just-in-time" concept allows firms to realign their organization, gather market data, and develop stronger infrastructure as the strategic plan is solidifying. There can be a sense that overall risk surrounding the integrity and "do-ability" of the plan is reduced because the team has more empirical evidence of progress, and early momentum is gathered in getting implementation on the road.
- The Legacy Plan ©: Legacy plans are the 800-lb. gorilla of planning, yet many firms need exactly that. Looking over a longer planning cycle, the firm needs to use the steady hand of a trusted advisor to navigate to a significant new vision. A legacy plan is typically transition-driven, and also used by firms that understand they must reinvent themselves along the way. Legacy plans are put in place over three years and include not only the strategy but also a marketing plan, market research, succession planning, organizational design, and leadership development. In other words, legacy plans involve a quite intense sequence of planning and doing, with implementation "blocks" lasting three to four months along the way.

The Real Goal of Planning: Implementation

Creating an action plan isn't brain surgery. Seeing dependencies and getting the sequence of actions right is a bit tougher. But the real secret sauce of implementing strategy is less about visible achievement and much more about dealing with the clash of fears and ambitions inherent in any planning team. Dealing with these belief obstacles/opportunities is the real game afoot.

What's required is a strong sense of leadership-driven responsibility to the future of the firm, including addressing the needs of the next generations to reach their wildest dreams. Less time should be spent on individual projects when you're a seasoned leader, more time needs to be spent honing and spreading powerful messages of what the future will look like, and how the team needs to function to make it there. Hire the right people, get on message about the future, and create the space for them to learn and perform-that's the real challenge of strategy and implementation.

The chaos we feel is nothing more than energy begging to be harnessed. Smart firms understand the frenzy has unlimited potential and can be transformed. Making the choice to excel-not just to compete-is transformational and will lead us to new doors opening beyond where anyone has imagined.

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Practice Management Digest

News & Best Practices from the PM Knowledge Community

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Challenges and Possibilities for the Architects of the 21st Century

By Bonnie Choy, Assoc. AIA, CDT

Editor's Note: The Practice Management Knowledge Community offered scholarships to two emerging professionals to attend the 2004 Desert Practice Conference, "Controlling Chaos," which took place in October in Indian Wells, Calif. Scholarship applicants were asked to respond to the following questions: Why are you interested in practice management? How will attending the 2004 Desert Practice Conference benefit your career? How will your attendance at the conference benefit the Practice Management Knowledge Community and the AIA? More than 25 compelling essays were received from emerging professionals, each explaining how and why attendance at the Desert Practice Conference would enhance their personal career development. The two essays that most clearly stated alignment with the AIA and the knowledge community's goals for the scholarship were selected for award. Here is an edited version of one of the two winning essays (the other winning essay will appear in the next issue). Ms. Choy's essay was particularly enticing because it was obvious that she studied the conference material and drew specific references to how these conference sessions would have an immediate and long-lasting impact on her development. She also explained how this experience would raise her awareness of the value of the future architect of the 21st century and her plan to spread the word among her peers and the profession as a whole.

As an intern-architect at Mitsunaga & Associates, a local architecture-engineering firm in Hawaii, I find practice management to be more important and applicable than ever. Practicing design professionals of today are realizing that we are not designing in a vacuum. We are designing with the help of the global community, building on ideas that counterparts have started to explore, and continually adding to the growing list of best practices for those design professionals who precede this generation.

I am personally interested in practice management because I believe there are rising expectations for the role of today's architect. As a design professional practicing today, staying current with new ideas and technology is essential. Additionally, there are always new concepts that an architect is expected to understand from business ideas such as real estate cycles to information on new technically advanced building materials. In the past, I believed it was best to leave these details to wealthy developers and design gurus such as Frank Gehry. Today, more than ever, I realize such knowledge is essential for the practicing architect of the 21st century. The evolution of the profession and the business of architecture rely on the quality of the information we attain, how relevant it is to our practice, and how we apply such information to the task at hand. Such information also helps us to better communicate and to work interdependently with other design professionals around the world. As a major player on the design team, an architect is expected to thoroughly understand factors that affect the design of a building. These factors range from big picture macroeconomic market conditions to more detailed aspects of project delivery.

The second reason I am interested in practice management is because I know that being knowledgeable about best practices in the profession will help to improve the quality of services to clients. A key factor in architecture is that of service. The profession revolves around providing value for the customer. Today, providing such value has come to mean creating structures that last longer and using energy more efficiently to create structures that are cost efficient to owners. At the same time, structures need to be environmentally friendly and safe. In the future, I envision creativity to be driven to an even greater extent by such value measurements as cost and energy savings provided to clients.

The third reason I am interested in practice management is because it

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encourages greater use of technology, which facilitates ease of communication and collaboration among design team members. Today's modern technology facilitates collaboration with design professionals across the world, an essential aspect of global practice in the 21st century. My first few years at work, for example, were spent learning and using a program called Buzzsaw. I had to learn that many of the company's project drawings were sent via this Internet-based program which facilitates online collaboration. While at the time Buzzsaw was new technology, today there are many other programs that facilitate collaboration by streamlining the process of putting a project out to bid, communicating with major players such as contractors as well as clients, and even allowing architects visibility to the location in which the building is being constructed by way of a Web camera. As a future licensed architect, I will be called upon not only to keep up with technology relevant to the industry but also to lead its use among my team of clients, users, and consultants.

I believe that attending the conference will greatly expand my knowledge and challenge my thinking about changes affecting global design and construction today. I enjoy keeping up with the latest body of knowledge in the profession and always strive to further my education. Besides graduating second in my class in spring 2001 at the University of Hawaii School of Architecture, I have also excelled in furthering my education at the university's School of Business where I am currently obtaining my masters in business administration and will graduate in fall 2004. I am an associate member of AIA Honolulu and I am active in both social events and continuing education sponsored by the Construction Specifications Institute (CSI). As an intern-architect practicing in the Asia Pacific Region, I have aspirations of obtaining my architecture license in Hawaii as well as one day managing my own Hawaii-based practice that will design structures globally. The new knowledge gained from the conference, "Controlling Chaos," will aid me in attaining my career goals by expanding my understanding of what is required of an architect practicing in the 21st century.

Attending the 2004 Desert Practice Conference will also benefit my career because it will expose me to new concepts facing design professionals all over the world. I am most interested in learning about evolving concepts and technologies such as alternative project delivery that will likely have large implications on practice in the near future. I especially look forward to participating in the special track focused on issues faced by the emerging professional, "Redefining Practice." I believe this track will be extremely valuable to facilitating growth in my career and attainment of my career goals. Another part of the conference I am excited about is attending the lecture by keynote speaker Ray Bradbury, author of *Fahrenheit 451* which I enjoyed reading years ago. I look forward to being inspired by his ideas, this time in the context of an audience comprised of design professionals.

Additionally, attending the Desert Practice Conference will benefit my career because it will help me connect with people and organizations that support growth and innovation in my profession. Because a large portion of the conference consists of discussion forums and interactive workshops, I will have the opportunity to meet and discuss issues with a variety of design professionals from the United States and abroad, thus allowing me to learn and gain new perspectives. The Desert Practice Conference will also allow me to become more familiar with future activities of the AIA and the Practice Management Knowledge Community. Familiarizing myself with the activities of the organizations that provide educational opportunities and uphold standards of knowledge management in my profession would be a great honor for me. Additionally, the conference would allow me to broaden my circle of acquaintances among the other AIA knowledge communities and members.

I also believe my attendance at the conference will benefit the Practice Management Knowledge Community and the AIA. With my educational background and aspirations, I believe I would be an excellent representative for the AIA associate membership as well as in the best position to help create a body of knowledge by which other young emerging professionals can be inspired. As a graduate student at the University of Hawaii School of Business, I have studied strategic planning and have engaged in interactive discussion forums. I believe the conference would be a good opportunity to share my knowledge with others in my industry. I believe I can contribute intelligently to the interactive sessions and especially the special seminar track emphasizing the emerging professional. Finally, I can also help to provide knowledge as an emerging design professional practicing from Hawaii's unique location. Positioned between Asia and North America, Hawaii's location on the east-west trade route has made it a major international trading center.

Keeping up with rising expectations for the architect will present both

challenges and possibilities for all emerging architects in the 21st century. Attending the seminar will provide me the valuable opportunity to learn practical applications necessary to meet the challenges and rise to the possibilities that exist for design professionals. I will also have the opportunity to develop valuable professional networks that will last for the rest of my career. I would be honored to represent the emerging design professional of the 21st century if chosen to be a recipient of the scholarship to attend the 2004 Desert Practice Conference. I believe I have a lot to share with other emerging design professionals and would be an excellent resource from which the Practice Management Knowledge Community and the AIA could draw.





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Chaos and Growth: Entering Unexplored Territory

By Bonnie Choy, Assoc. AIA, CDT

Editor's Note: A final requirement of scholarship recipients to the 2004 Desert Practice Conference was to provide a synopsis of their conference experience. Here, recipient Bonnie Choy presents a synopsis of the professional expansion she experienced at the conference. Her essay validates the Practice Management Knowledge Community's selection of her as one of the prestigious emerging professionals. She, in a most gracious and heartwarming manner, explains how the conference revealed to her that "chaos is unavoidable when entering unexplored territory. Though it is always a little overwhelming, the learning and growth gained through the experience is absolutely exhilarating." With a positive attitude and optimism like Ms. Choy's, we "emerged professionals" can rest assured that the future of the profession is in good hands.

Three flights and eight hours after leaving my home in Honolulu, I arrived at Palm Springs Airport. Despite feeling winded from travel, I was excited to attend the 2004 Desert Practice Conference. Unfortunately a small setback occurred at the Palm Springs Airport: the propeller plane that had taken me from Los Angeles to Palm Springs lost my luggage. I waited in earnest after a very chaotic day for the next plane to bring my luggage.

As I waited, I thought about the conference, which was ironically titled "Controlling Chaos." It had been only four weeks ago that the Practice Management Knowledge Community chair, Amy Yurko, called to tell me that my submission for an essay contest had won me one of two scholarships given to attend the three-day conference. The brief four weeks I had to prepare myself for the conference flew by quickly. I engaged myself in booking my airline ticket, registering for conference workshops, and e-mailing, and talking to many members of the Practice Management Knowledge Community Advisory Group. Now, just hours from the conference, I found myself smiling despite the chaos I was experiencing. It occurred to me that the most chaotic times in my life were also times when I experienced the most learning and growth. I began to realize that all of the preconference "chaos" I had experienced was a good omen for the growth and learning that lay ahead in my three-day conference experience.

The first growth I experienced was breaking out of my shell. Although I hate to admit it, I am shy when meeting people for the first time. But the short three-day conference afforded so many opportunities to network; I could not let shyness get in the way of opportunities. Besides, I was an official representative for emerging professionals and as a representative I needed a strong voice.

I spent the first day of the conference meeting members of the AIA California Council and the Practice Management Knowledge Community Advisory Group. I shook hands and took pictures with a dozen people which put faces to my earlier e-mails and phone calls that I had made from Honolulu. I began my day attending the preconference workshop, "Guiding Your Firm through Key Development Phases: From Infancy through Mastery," where I was the only attendee with fewer than 10 years work experience. It was quite an honor for me to sit with such an array of experienced firm principals, partners, chief executive officers, and owners—the cream of the crop of AIA California Council's members.

The second growth and learning experience for me was new insight on the global practice of architecture. I am sorry to say that I have never participated in any AIA activities outside of those sponsored by AIA Honolulu. The conference workshops allowed me to learn about an array of topics being addressed by firms all over the United States and beyond. Project delivery methods, for example was an especially important topic for the AIA California Council. In the concurrent breakout session, "Understanding the Chaos of Alternative Project Delivery," a panel with a construction manager, an

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architect, and an owner gave me insights about different perspectives on alternative project delivery methods. One important panel conclusion reached was that there is a greater need for knowledge sharing and collaboration among the three parties and among all of the design team members to reduce construction time and costs and provide greater value for the client. Besides the panel discussion, the conference offered an enlightening breakfast roundtable discussion session where I joined an elite group of famed architects, among them Jack McAllister and Norbert Young. It was over breakfast that we discussed compelling questions about our profession such as whether building information modeling and computer-assisted drawing outsourced to international countries will revolutionize the architecture profession.

The third growth experience I gained was realizing that the architecture profession is being redefined in many ways. Two concurrent breakout sessions provided me with new venues to my thoughts on the direction in which the profession is moving. The two sessions were "Development Financing 201: An Architect's Guide to the Secret World of Developer Financing" and "The Value of Public-Private Partnerships: Teaming Cities, Developers, Architects, and Contractors." Both allowed me to further realize that architects today are called to greater tasks, beyond the scope of design. The two sessions helped me learn about such issues as joint partnerships with public institutions (e.g., public schools and universities), strategic ways to fund developments, and ways to make these development projects economically viable. In the session, "The Value of Public-Private Partnerships," speaker Ted Tanner, AIA, senior vice president at Anschutz Development, amazed me with his knowledge of the latter issues. He pointed out the extent to which the role of the traditional architect is changing. I also had an intriguing conversation with Dan Kirby, AIA, director of development at Noram Development Company. Because I hope to work on the developer side, attending these sessions, as well as meeting people practicing in positions alongside developers, was valued.

A fourth growth experience I gained at the conference was being exposed to the latest continuing education topics in the industry. As time passes, new materials, technologies, and business concepts challenge the status quo and, as a result, staying current with industry knowledge is essential. At the conference I realized how important continuing education is toward keeping up with developments in the field. The topics in the workshops and breakout sessions included, but were not limited to, learning about new and popular materials such as cellular PVC trim products, new technologies like building information modeling (BIM), and new business concepts such as strategic planning. In the breakout session, "Business Intelligence: The Foundation for Strategic Planning," I learned how surveys can be used to obtain vital information to better meet client needs. Surveys for unsuccessful proposals as well as for marketing purposes are extremely useful to the architect practicing in the 21st century. All of the latter continuing education topics served to remind me about the extent of complex knowledge that exists within the profession and that there are many things to learn, from business to design concepts.

The fifth growth experience I gained was being exposed to the optimism the profession holds for the future. In the opening ceremony, keynote speaker John Seely Brown spoke of the new generation engaging in unprecedented amounts of collaboration and multitasking. The new generation enjoys challenges so much so that they are willing to constantly question the older generation. The new generation, which he calls the "remix culture," probes for answers and are willing to explore unfamiliar information and synthesize such information to something they can understand. This generation is also perfectly willing to collaborate with others in order to be exposed to new ideas and concepts with which they are unfamiliar.

In addition to famous architects, I met another emerging professional, a woman of my age named Yolanda Santiago, who had traveled seven hours and nearly 500 miles by car to take advantage of the special discounted one-day registration fee. This tenacious young woman told me she tracked the AIA conferences and, any chance she got, would attend them. While I was fortunate to stay at the Marriot Esmeralda where the conference was being held because of my scholarship fund, she told me was staying at a motel miles a way for a bargain price. I was absolutely touched that any young professional would have this much enthusiasm to sacrifice his/her time and distance to attend the conference. I can only imagine how much information she has already been able to draw from attending the AIA conferences.

I was also fortunate to meet and dine with Jason Pierce, the other winner of

the emerging professional essay scholarship. Jason, Yolanda, and I attended one of the concurrent breakout sessions for the emerging professional given by Clark Kellogg, "The Future of Practice." Together in the same room, we discovered we had a lot in common in terms of our professional goals. We were all diligently studying for the architectural registration exams and are now exchanging e-mails.

Chaos is unavoidable when entering "unexplored territory." Though it is always a little overwhelming, the learning and growth gained through the experience is absolutely exhilarating. Having attended the conference, my belief is that there is no way to control chaos. The most we can hope for is to manage it as best we can and to enjoy the benefits derived from that challenge. We can have the courage to enter the "unexplored territory" by exposing ourselves to a variety of information and knowledge that is unfamiliar and, yes, in many cases untested. In the process of trying to synthesize a variety of new information, we will provoke others to think about the information in new ways, fuse discussion, and gain new insights and ideas. To me, chaos means "good things in store" and challenges to the status quo which result in new learning and growth for all. There is a great deal of knowledge to explore in our profession as well as opportunities for collaboration. By dealing with the chaos now, we can improve the profession for this generation as well as the next.

Bonnie Choy, Assoc. AIA, CDT, graduated second in her class at the University of Hawaii School of Architecture in 2001. She will graduate with a masters in business administration in December 2004. Ms. Choy works full time as an intern-architect at Mitsunaga & Associates, an architecture/engineering firm in Honolulu.