



# Practice Management Digest

News & Best Practices from the PM Knowledge Community



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## Features

### Letter from the editor

This issue of the Practice Management Digest focuses on the past and future in presenting practice management ideas and tools. [Read the full letter.](#)

### About Knowledge Management

by Dr. Laurence Prusak

For the past two decades or so, professional service firms of all kinds have been trying to get their hands around the subject of knowledge and especially how to work with knowledge effectively. Inspired by consultants, journalists, management writers, etc., there has been a substantial movement to *do* something about knowledge, which has had a particular appeal to those firms whose knowledge was obviously the source of their wealth-management consulting firms. Law firms led the movement within professional service firms, followed by a host of other knowledge-based firms. We can characterize this movement historically from what these and many other organizations focused on when they initially tried to manage this elusive thing we call knowledge. [More](#)

### The Eight Wastes that Are Stealing Your Time, Energy, Effort and Money

by Anthony Manos

Over the last several decades, we have learned a lot about building cars efficiently, and profitably, from Toyota. The Toyota Production System (TPS) has come to be known by the term "Lean" around the world. Toyota and other successful manufacturing companies have learned that Lean does not just apply to the value-adding employees on the shop floor. Since 80 percent of waste does not occur on the manufacturing floor, there is a lot of improvement needed in office and support function areas. What Toyota learned to apply to manufacturing in the 1990s has since blossomed to all types of organizations. Many companies in the service industry are adopting Lean techniques with great success. The same principles that are practiced on the shop floor are relevant for service companies, hotels, hospitals, banks, insurance, and construction companies. One of the key elements of Toyota's success is properly identifying problems and solving them. That's where the "8 Wastes" fit in. [More](#)

### Measuring and Managing Quality and Performance at the Firm Level: The Quest for Business Intelligence

by Jack Reigle

We all want better answers, and we want them faster. We want to manage with more intelligence; we want to make the best decisions possible. Unfortunately, most firms do not possess the tools that will help them find the type and the quality of answers they need to important questions regarding operational performance, strategy, predictive analysis and team effectiveness. However, a new breed of business intelligence systems is emerging within the corporate world. The aim is to provide fully-integrated, relevant and actionable information that blends a historical view with a directional outlook. Design firms need the same kinds of tools, and while such a solution remains elusive in the present, I predict its arrival will be swift and certain. [More](#)

### Multi-generational Leadership Roles for Architects: Design, Sustainability and Leadership in Local and Regional Communities

by Tim Hemsath, AIA, LEED AP

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For a panel presentation at the AIA 2008 National Convention, we wanted to unite a diverse group of leaders who are changing our built environment locally and regionally with design and the environment in Nebraska. The session discussed how these diverse leaders including young architects, established professionals and retired architects, are working to educate and advocate for a range of issues involved in the context of the Heartland. The panel presented a series of case studies examining multi-generational leadership roles held by architects working in design and sustainability in order to bring about positive civic and community change for all people across this region. [More](#)

### **The Value Proposition: Moving the Profession from Best Value to Added Value**

*by Yolanda Cole, AIA, IIDA, LEED AP*

AIA National is taking a new look at its brand, starting with the theme of the 2008 convention: We the People. The AIA proposes to move beyond health, safety and welfare and toward a path that "demonstrates our inseparable position within the most pressing issues of our time." In order to meet this lofty goal, we have to move beyond best value, the balancing act between the art, craft and business of architecture, and toward added value, design that is so smart, thoughtful and inspiring that it significantly influences communities and key players in society. Let me give you a small example from my own experience. [More](#)

### **Tethered Millennials: Training the Net Generation**

*by Meg Brown, AIA and Cliff Moser, AIA, LEED AP*

In *Generations* (1991), Strauss and Howe proposed the theory of generational cohorts, where every generation of twenty or so years reacts to and is part of the previous generation's systems and framework. In 2000 they published *Millennials Rising*. This work investigated the emergence of the Millennials, born 1982 to 2001, and their relationship and involvement with their previous generations, the Boomers and Generation X (GenX, or Xers). In contrast to the downbeat and alienated youngsters familiar to their own childhood, Strauss and Howe suggested that this new generation would be engaged and upbeat. They accounted this to their "Generational Awakening" theory, casting Millennials as the next great generation, even comparing their potential to the last great generation, that of the GI WWII vets. [More](#)

### **Not Your Grandfather's Drafting Class: Transforming High School Architectural Education**

*by Jennifer Masengarb, Krisann Rehbein, Travis Soberg, AIA, LEED AP, and Yamani Hernandez*

Tens of thousands of high school students across US take an architectural drafting course each year. While students who emerge from these courses often become highly proficient in CAD and rendering software, many students lack both an understanding of architectural concepts and the skills to look critically at the built environment around them. Many high schoolers are also not typically exposed to the design process, sustainable principles, or influential contemporary and historic buildings.

To address this challenge, the Chicago Architecture Foundation (CAF) has recently published *The Architecture Handbook: A Student Guide to Understanding Buildings*. As a college-prep architecture textbook for high school students, the book is the first of its kind and has broad applications for classrooms across the country. [More](#)

### **Preface to *The Power of Design***

*by Dr. Richard Farson*

Dr. Richard Farson spoke at our PMKC lunch, where he presented to a sold-out room from his book, *The Power of Design*, to be released this October. Please click on the link above to read its preface.

An author of numerous best-selling management books (*Management of the Absurd*, and *He Who Makes the Most Mistakes, Wins*), Farson operates the Western Behavioral Sciences Institute, which was founded in 1958 as an independent, nonprofit organization devoted to research, education and advanced study in human affairs. He was the founding dean of the School of Design at the California Institute of the Arts, and a 30-year member of the Board of Directors of the International Design Conference in Aspen, of which

he was president for seven years. In 1999 he was elected as the one non-architect Public Director to the national Board of Directors of the American Institute of Architects.

## ***News***

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## ***Miscellaneous***

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With this issue we present a new feature, the Integrated Project Delivery (IPD) corner. This will be a featured IPD article in each issue intended to help firms understand the promise and challenge of Integrated Practice. This month's feature is entitled "**Integrated Project Delivery and the Fully Engaged Emerging Professional**," and is written by Zigmund Rubel. [More](#)

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# Practice Management Digest

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## Letter from the Editor

by the Practice Management Digest Editors

This issue of the Practice Management Digest focuses on the past and future in presenting practice management ideas and tools.

Featuring ideas and tools from the past, we are presenting select writings from presentations made this past May at the National AIA Convention in Boston. With regard to the future, we present ideas and knowledge to be elaborated on in future Practice Management webinars.

Practice Management covers the practice of architecture from Human Resources, to Business Development; from Concept Design to Construction Administration. The selections in this issue demonstrate the diversity of expertise required to manage an architectural practice.

Jack Reigle, who ran a 4-hour Quality Management workshop with John Broomfield and Cliff Moser, writes about ["Measuring and Managing Quality and Performance at the Firm Level: The Quest for Business Intelligence."](#)

Jennifer Masengarb writes about teaching high school students about architecture in ["Not Your Grandfather's Drafting Class: Transforming High School Architectural Education."](#)

Tim Hemsath writes about his experience in sustainability in ["Multigenerational Leadership Roles for Architects: Design, Sustainability and Leadership in Local and Regional Communities."](#)

Meg Brown and Cliff Moser write about four generations in the workplace and the attendant challenges in ["Tethered Millennials: Training the Net Generation."](#)

Yolanda Cole writes about design in her presentation, ["The Value Proposition: Moving the Profession from Best Value to Added Value."](#)

Also included in this issue is the [preface to \*The Power of Design\*](#), the new book by Dr. Richard Farson. Dr. Farson operates the Western Behavioral Sciences Institute, founded in 1958 as an independent, nonprofit organization devoted to research, education and advanced study in human affairs. He was the founding dean of the School of Design at the California Institute of the Arts, and a 30-year member of the Board of Directors of the International Design Conference in Aspen, of which he was president for seven years. In 1999 he was elected as the one non-architect Public Director to the national Board of Directors of the American Institute of Architects.

For the future tools and ideas portion of this issue, we feature articles written by authors who come from outside of the world of architecture. Dr. Laurence Prusak is the founder and director of the Institute for Knowledge Management, a global consortium of business organizations engaged in advancing the practice of knowledge management through action research.

Larry has been studying knowledge and learning in organizations for the past two decades. He has extensive experience, both within the U.S. and internationally, in helping organizations manage their information and knowledge resources. He has written several books, such as *Working Knowledge* and *Information Ecology*. Larry's article is entitled ["About Knowledge Management."](#)

A catalyst with Profero, Inc., Tony Manos provides professional consulting services to organizations focusing on implementing Lean Enterprise. Tony is trained and certified by the National Institute for Standards and Technology (NIST), U.S. Department of Commerce, in all elements of Lean. Relying on his diverse knowledge of business and creative techniques and applications, he assists clients of all types and sizes in the implementation of Lean Enterprise. His article in this issue is entitled ["The Eight Wastes That Are Stealing Your](#)

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Time, Energy, Effort and Money."

Additionally, with this issue we present a new feature, the Integrated Project Delivery (IPD) corner. This will be a featured IPD article in each issue intended to help firms understand the promise and challenge of Integrated Practice. This month's feature is entitled "**Integrated Project Delivery and the Fully Engaged Emerging Professional**," and is written by Zigmund Rubel.



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## About Knowledge Management

by Dr. Laurence Prusak

For the past two decades or so, professional service firms of all kinds have been trying to get their hands around the subject of knowledge and especially how to work with knowledge effectively. Inspired by consultants, journalists, management writers, etc., there has been a substantial movement to *do* something about knowledge, which has had a particular appeal to those firms whose knowledge was obviously the source of their wealth—management consulting firms. Law firms led the movement within professional service firms, followed by a host of other knowledge-based firms. We can characterize this movement historically from what these and many other organizations focused on when they initially tried to manage this elusive thing we call knowledge.

The first phase was really directed towards managing information—documents, mostly, renamed and disguised as knowledge. Inspired by technology vendors and some large industrial concerns, this attempt proved seriously disappointing to its practitioners and only lasted a few years, though there are still advocates for it today.

The second phase was more focused on personal technologies, such as the newly-ubiquitous PCs, and assumed that pure connectivity was enough of an impetus to create a knowledge-sharing culture. Much of the current Web 2.0 energy is directed towards these goals. Connectivity by itself, while useful and valuable, can also just produce noise and static. It is no guarantee of any knowledge development or sharing.

The third and current phase certainly absorbs pieces of these first two attempts, but is much more focused on the "group" or "practice." Its practitioners better understand the essentially social nature of knowledge and how knowledge is organized through groups of people who share tasks, passions, vocabulary, stories, tools, and identities.

However, researchers and practitioners have learned that that no matter what the unit of analysis, there needs to be some specific direction and management for any knowledge activities to really have an impact on the organization. Following are some of these essential elements.

There are three basic things one can do with organizational knowledge: development, retention and transfer. A firm needs to allocate its knowledge resources accordingly, based on which of these activities it wishes to emphasize.

There needs to be a concrete effort to create a knowledge-sharing culture. This is most usefully done by maintaining enforced social norms of cooperation. In other words, fire those who don't share and promote those who do. Signals and symbols from senior management are also crucial for this work.

Talk up the subject and understand that what you know and how that knowledge is used is your only competitive advantage. For many reasons, this fact is still only partially understood in the U.S., but it needs to be actively discussed within your organization if you are going to make any progress in working with this most valuable but elusive resource.

**Dr. Laurence Prusak** is a researcher and consultant and was the founder and Executive Director of the Institute for Knowledge Management (IKM). He is the author of a number of books on knowledge management, including *Storytelling in Organizations: why Storytelling is Transforming 21<sup>st</sup> Century Organizations and Management*, *What's the Big Idea? Creating and Capitalizing on the Best New Management Thinking*, *Working Knowledge*, and *Knowledge in Organizations*. He currently co-directs "Working Knowledge," a knowledge

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research program at Babson College, where he is a Distinguished Scholar in Residence.







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## ***The Eight Wastes That Are Stealing Your Time, Energy, Effort and Money***

by Anthony Manos

Over the last several decades, we have learned a lot about building cars efficiently, and profitably, from Toyota. The Toyota Production System (TPS) has come to be known by the term "Lean" around the world. Toyota and other successful manufacturing companies have learned that Lean does not just apply to the value-adding employees on the shop floor. Since 80 percent of waste does not occur on the manufacturing floor, there is a lot of improvement needed in office and support function areas. What Toyota learned to apply to manufacturing in the 1990s has since blossomed to all types of organizations. Many companies in the service industry are adopting Lean techniques with great success. The same principles that are practiced on the shop floor are relevant for service companies, hotels, hospitals, banks, insurance, and construction companies. One of the key elements of Toyota's success is properly identifying problems and solving them. That's where the "8 Wastes" fit in.

Taiichi Ohno, considered by many as the Father of the Toyota Production System, realized that the work and how it was performed held many opportunities for improvement. His famous walks on the shop floor had trained him to look for waste. He decided that these forms of waste could be categorized into what he called the "Seven Deadly Wastes." Of course, as part of continuous improvement there is an additional waste that is very common among Lean practitioners, bringing the total to eight.

The following list will give an explanation of each waste, and how it applies in office or support function areas, as well as in service organizations. See if you have ever encountered things like this.

**Overproduction** - *making more, earlier, or faster than the next process needs it*

- Does accounting print out 20 copies of a report that only three people really look at?
- Has a boss ever asked on Monday for a report to be completed by Wednesday and she really didn't need it until Friday?
- Are all-staff meetings held, or emails sent, when the information only pertains to a few people?

**Motion** - *any movement that does not add value to your product or service*

- Walking back and forth to the printer that's located out in the hallway?
- Trying to bend, reach, or grab binders or folders from your chair?
- Walking to get files?

**Inventory** - *anything in excess of one-piece flow*

- Have twelve projects piled up on your desk because your boss can't decide the priority ("They're all important!")?
- Have too many items or materials around your work area, like prototypes in an engineering department?
- Have banks of file cabinets storing files that no one has looked at in years right in the middle of your office space?

**Transportation** - *moving people, materials and information around the organization*

- Using pneumatic tubes to move documents from one location to another (they never break down do they)?
- People having to walk between buildings to meet with others on their project?
- Using expediting messenger services to move paperwork?

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**Waiting** - *waiting for man, machine, materials, information, etc.*

- Waiting for a call back from a client, or waiting for a response to an email?
- Waiting for approvals?
- Waiting at the copier because someone is printing out 50 copies of a 70-page report?

**Under-Utilized People** - *not tapping into people's education, skills, experience, knowledge, creativity, etc.* (This is the additional waste mentioned above)

- Learning that one of your employees is a volunteer leader in an outside organization?
- Not listening to ideas or suggestions from the value-adders on how to make improvements?
- Focusing on the 'hands' and not the 'head'?

**Defects** - *anything that needs to be scrapped, adjusted, reworked, etc.*

- You receive a blue print or drawing that has obvious errors on it?
- You aren't provided with the complete information or accurate information?
- You just fix things yourself instead of bringing it up with the person or group that caused the defect?

**Over-processing** - *additional effort that adds no value from the customer's viewpoint*

- Have multiple sign-offs when not needed?
- Creating additional paperwork or additional signatures to help solve a problem?
- Performing checks, double checks, triple checks?

If you have ever seen anything like this, you have observed waste. So the key is to learn how to identify waste so that we can reduce or eliminate it. How do you go about fixing these problems? There are many tools and techniques used in the Lean world to make this happen. More importantly, however, is that people in your organization become true Lean thinkers.

If you can't see the waste, you can't get rid of it. A quick, simple method to train people to recognize waste is to perform "Waste Walks." In a small group, walk with purpose, through an area noting waste and possible solutions. This will help promote discussion and a better understanding of your workplace. Never settle for the "we *have to* do it this way" answer. Be open-minded and realize that there is always room for improvement.

*Tony Manos is presenting our Thursday (Oct 16) lunch Keynote at the PMKC Fall conference in Chicago. A catalyst with **Profero, Inc.**, Tony provides professional consulting services to organizations focusing on implementing Lean Enterprise. Tony is trained and certified by the National Institute for Standards and Technology (NIST), U.S. Department of Commerce, in all elements of Lean. Relying on his diverse knowledge of business and creative techniques and applications, he is able to shape the Lean Tools of manufacturing into implementation processes for professional service organizations. He assists clients of all types and sizes in the implementation of Lean Enterprise.*



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## ***Measuring and Managing Quality and Performance at the Firm Level***

**The Quest for Business Intelligence**

by Jack Reigle

*"The sum of anecdotes is not data." - Roger Brinner, Economist*

We all want better answers, and we want them faster. We want to manage with more intelligence; we want to make the best decisions possible. Unfortunately, most firms do not possess the tools that will help them find the type and the quality of answers they need to important questions regarding operational performance, strategy, predictive analysis and team effectiveness. However, a new breed of business intelligence systems is emerging within the corporate world. The aim is to provide fully-integrated, relevant and actionable information that blends a historical view with a directional outlook. Design firms need the same kinds of tools, and while such a solution remains elusive in the present, I predict its arrival will be swift and certain.

Living in a project-based world can make it harder to see the need and value for business intelligence and the system required to support it. Clients throw us curveballs that can't be hit, resource management is always a challenge, and design firms tend to resist using sophisticated measurements to better understand their firm's performance. This thinking is based on the sense that collecting anything more than the most basic project data will not pay off. Principals may try to ask for more, but the typical response is lukewarm at best. When more sophisticated analysis is done, it tends to be *ad hoc*, and doesn't become embedded into the firm's habits and culture. When forced to agree to new methods of collecting data, people typically agree without commitment, and the initiative often fades into the sunset.

And what about the challenges of implementing important new strategies? The fact is, most firms struggle there too. Action plans from the planning meeting age quickly. Without dogged determination on the part of a firm's leadership, cracks develop in the integrity of the plan, and staff may begin to fall back to old routines, weakening the new direction.

Can a Business Intelligence System fix these fairly typical human failings? Not always. But this is the best chance to overcome the management obstacles connected to collecting and using performance data to run and build your firm. Business intelligence is powerful because it provides an integrated view of how you're doing. Instead of traditional 'single-thread' measurements, such as utilization rate, net revenue per employee, net multiplier and overhead rate, business intelligence formulas look at a larger slice of the activities being performed. This allows you to set your own benchmarks for performance levels, and organize goals by firm, market, team and individuals.

The promise of business intelligence boils down to the leverage it can bring to making better decisions, made easier. Instead of relying on anecdotal comments, data is collected on both an action-driven basis as well as a results-driven basis. This allows for the blending of results from three primary arenas within the firm: operating results, strategic initiatives and systems development for the creation or strengthening of key processes or functions, such as accounts receivable, marketing, expertise development, project reviews, and other discrete systems within the firm.

Business Intelligence for professional services firms will be a revolution in thinking about and managing all aspects of firm performance.

*Examples of BIS Formulas for Design Firms*

The following examples are representative of the type of additional

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measurements a firm can add to its toolkit. They are flexible and can be modified to meet individual firm needs.

### **Revenue Quality Index:**

Index Goal: to display how each project stacks up in terms of overall financial performance.

Formula elements:

- All projects begin with a baseline of 100
- Actual revenues vs. contract fees. Express as a percentage, e.g., 90%, 110%, etc.
- Accounts receivable performance: dollars collected beyond firm AR target cycle, as a percentage of the total. Factor as a penalty using 10% of total. Subtract from baseline.
- Non-billables as a percentage of total actual revenues. Take the total and figure the percentage of impact on total revenues, subtract.
- Profit vs. plan: add or subtract percentage over/under plan

### **Market Focus Index:**

Index Goal: to track the firm's performance to meet targets within revenues by market.

Formula elements:

- Decide on primary markets, and also retain a "general" market bucket.
- Set annual revenue goals by these market types
- Identify contracts when signed as part of the right bucket
- Using contract value, show revenue by market monthly, and compare to original revenue forecasting.
- Don't average the market results, display as a percentage above or below 100% of target.

### **Market Expertise Index**

Index Goal: to display firm performance at deepening their position in each focused market they choose.

Formula elements:

- Set annual targets for speeches, articles, client conferences, market-focused products and tools to develop, etc.
- Consider each activity of equal weight, and simply measure it as a percentage of performance against the goal of completing the activity within the year.
- 50% would be horrible, 90% would be strong, 120% would be stellar.

### **Professional Development Index**

Index Goal: to track the collective progress of professional staff in pursuit of certifications, registrations and other notable, standardized, industry-recognized achievements.

Formula elements:

- Individuals formalize their plans annually.
- Targets can be partial or full achievement of the new status
- Each result is equal weight, measured as a percentage of performance against the annual plan.

### **Project Management Index**

Index Goal: to reflect the overall effectiveness of the project management system and efforts.

Index elements:

- Project plans developed vs. standards (some project, say under \$5,000 in value, may not require a formal plan) Use 100% as goal,
- Performance related to phase reviews conducted, as a percentage of total phases
- Formal project close-outs conducted as a percentage of the total

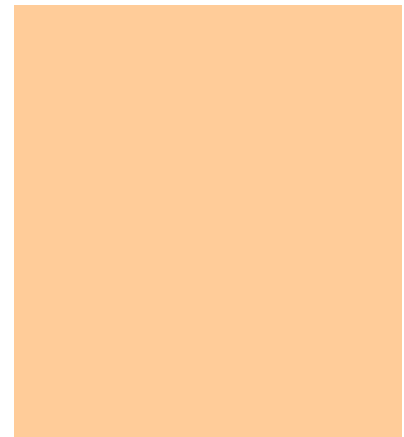
Every firm will have a different slant, a different emphasis on how to utilize these extended tools to best run their practice. The important thing to remember is that these tools are flexible and they should, over time, be

incorporated into the leadership's regular routine when looking at business performance. Instituting these measurements isn't difficult, yet there is some work to be accomplished when it comes to ensuring trust and establishing an agreed rationale for looking beyond the industry's basic approach.

Is your firm ready to take on a more sophisticated view of performance? If not, what do you need to do to lay the groundwork? Competition is likely to get fiercer than ever over the upcoming years, and this means there's a good chance that others will be moving ahead when it comes to business intelligence.

Make sure your firm is one of them.

(Adapted from Jack Reigle's book: *Silver Bullets: Strategic Intelligence for Better Design Firm Management*, published in May, 2008. Visit [sparkspublications.com](http://sparkspublications.com) to learn more about the book. Please contact Jack with questions or comments at [jack@sparksstrategy.com](mailto:jack@sparksstrategy.com).)





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## ***Multi-Generational Leadership Roles for Architects*** **Design, Sustainability and Leadership in Local and Regional Communities**

by Tim Hemsath, AIA, LEED AP

Summary of [AIA 2008 National Convention session TH-22](#)

For a panel presentation at the AIA 2008 National Convention, we wanted to unite a diverse group of leaders who are changing our built environment locally and regionally with design and the environment in Nebraska. The session discussed how these diverse leaders including young architects, established professionals and retired architects, are working to educate and advocate for a range of issues involved in the context of the Heartland. The panel presented a series of case studies examining multi-generational leadership roles held by architects working in design and sustainability in order to bring about positive civic and community change for all people across this region.

First, Tim Hemsath, a recently registered architect and AIA member, highlighted the value and importance of youth leadership in the academic setting. He discussed the successful efforts of the newly-organized Emerging Green Builders at the University of Nebraska-Lincoln, a student organization of the Flatwater chapter of the U.S. Green Building Council. The founding students were successful in advocating for LEED certification for buildings funded with student tuition. Since this bold effort, the student organization has grown to over 100 members on two separate campuses. Their success has been built on a culture of leadership in the College of Architecture that inspires, empowers and trusts students to make a positive impact on our world.

Next, AIA member Nicolette Amundson discussed her leadership role in founding two organizations, the Flatwater chapter of the U.S. Green Building Council and the Green Omaha Coalition (GOC). Her leadership has been successful in promoting a healthy, sustainable community through partnerships, policy, and smart solutions in Omaha. Her latest work with the GOC intends to accomplish its mission through leadership and coalition building with public and private sector entities and residents as a whole - fostering collaboration with key stakeholders in the community to accelerate the adoption of green practices, policies, and programs.

Following this, Cecil Steward was asked to contribute his "retired" perspective on leadership by highlighting his leadership efforts since serving as President of AIA in 1991-92. His presentation was focused on "The Five Domains" (environment, economics, socio-cultural, technology and policy), a principle that has guided his work as CEO & President of the Joslyn Castle Institute for Sustainable Communities.

"If we are to have a reasonable chance of managing the growth of the urban habitat, and at the same time achieve a balance of economic development with the conservation of the earth's natural systems, we must expand our definition of the principles of sustainability, and, we must see the problem in a systems context. Since the beginning of the concepts and the language (i.e., the Bruntland Commission of the United Nations, 1987) sustainable development has consistently been represented as having three domains - the environment, economics, and the socio-cultural context - and, that they must be treated interdependently for a sustainable balance to occur.

There are numerous examples of human invention and/or intervention that can be noted to have either facilitated or retarded community progress toward sustainability. Two extreme, and debatable, examples are the automobile (technology) and the consequences of its use, resulting in threats to the natural systems, and the principle of humans "owning" land (policy) and the consequential effect of economic speculation on the earth's natural systems. Whether or not we individually value these conditions is not important.

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Technology is a fact of modern life, one that is influential and will continue to accelerate through human ingenuity. So, too, will the rules and regulations for relations among us, and our access to the bounties of the earth. Both technology and policy are domains that are pervasive, affective, and the cause and effect relationships to the other three domains [environment, economics, socio-cultural] are inseparable from them."

Finally, Connie Spellman discussed her role as Director of Omaha by Design in undertaking one the largest metropolitan zoning revisions for a city of Omaha's size, a population of approx. 500,000. Omaha by Design, an initiative of the Omaha Community Foundation, is dedicated to changing the face of Omaha through the use of urban design principles and citizen engagement. Founded in 2001 as Lively Omaha, the organization facilitates partnerships between the public and private sectors to execute projects that improve the quality of the natural and built environments throughout the metropolitan area. The Omaha by Design projects and activities center on three components: **Green Omaha**, which seeks to preserve and enhance the city's natural setting and public park system; **Civic Omaha**, which seeks to define and improve the city's civic places and public image; and **Neighborhood Omaha**, which seeks to preserve and enhance the city's residential neighborhoods. These three components comprise the **Urban Design Element** of Omaha's Master Plan, which establishes the city's long-range policies, goals and standards as a general guide for its physical development.

*The leaders, presenters and authors who contributed to this article and to the panel session include: Nicolette Amundson, AIA, Bahr Vermeer Haecker; Timothy L Hemsath, AIA, University of Nebraska-Lincoln College of Architecture; Connie Spellman, Omaha by Design; and W. Cecil Steward, FAIA, Joslyn Institute for Sustainable Communities.*





# Practice Management Digest

News & Best Practices from the PM Knowledge Community



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## The Value Proposition

### Moving the Profession from Best Value to Added Value

by Yolanda Cole, AIA, IIDA, LEED AP

*"The reasonable man adapts to the world; the unreasonable one persists in trying to adapt the world to himself. Therefore, all progress depends upon the unreasonable man." - George Bernard Shaw*

I came across this quote recently in a book unrelated to the practice of architecture, yet it spoke to me and I keep it tacked above my desk for inspiration. What could it possibly mean for our profession? It's really not about being unreasonable, but about challenging the status quo, experimenting with new ideas and taking some chances to make a real difference in our communities and in our profession. If that means we have to be just a bit unreasonable, then so be it!

AIA National is taking a new look at its brand, starting with the theme of the 2008 convention: *We the People*. The AIA proposes to move beyond health, safety and welfare and toward a path that *"demonstrates our inseparable position within the most pressing issues of our time."* In order to meet this lofty goal, we have to move beyond *best value*, the balancing act between the art, craft and business of architecture, and toward *added value*, design that is so smart, thoughtful and inspiring that it significantly influences communities and key players in society. Let me give you a small example from my own experience:

My firm was recently asked to participate in a design competition for a new headquarters for a high-profile think tank in DC. Twelve firms were asked to submit qualifications, eight firms were asked to prepare fee proposals and five firms were asked to prepare design concepts - all without having the opportunity to interact with the organization. Based on the design concepts, three firms were asked to present in an interview. Just the other day, our new client said to us, *"Everyone else gave us an office building. You gave us a dynamic and powerful image of who we could become."* This is what won the job. We took them beyond what they could imagine for themselves - and that's added value. Now, it's our job to challenge ourselves to make an impact on the larger community and the key players who will inhabit this venerable institution.



Image: Hickok Cole Architects

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*Image: Hickok Cole Architects*

To kick-start our unreasonable journey, I assembled a panel of leading architects to showcase projects that added value for their clients and their communities in three sectors of the profession: government, institutional and commercial. The goal was to demonstrate how each project contributed more than its share of the art, craft and business of architecture and influenced entire communities through bold concepts that addressed larger social issues.

Joan Goody, FAIA, Principal of Goody Clancy, presented The Massachusetts State Transportation Building, a project that is twenty-five years old and still kicking. This 900,000 sf government office building became the catalyst to the redevelopment of an entire community by its creative site planning, interactive social spaces and ground-breaking strategies in sustainable design. The architect in this instance went beyond the programmatic requirements of the project to stretch the envelope of what a government building could be. The result is a building that saved tax-payers millions of dollars, provided high occupancy satisfaction and succeeded in creating a whole new neighborhood. The fact that it is still a popular place today is a testament to its lasting influence on society.



*Image: Goody Clancy*



*Image: Goody Clancy*

Carol Ross Barney, FAIA, Principal of Ross Barney Architects, presented a jewel-box of a building for the Jewish Reconstructionist Congregation in Evanston, IL. In this project, Ms. Ross Barney turned the program upside down, providing a light-filled sanctuary on the top floor of the building. The procession to this sanctuary became a metaphor for ascending into heaven, and toward the light. In addition, the building was cleverly built upon old foundations, saving the congregation dollars on things unseen. Materials from the old building were recycled to form visible portions of the new building, and site trees that had to be removed were given new life as part of an all-encompassing sustainable design concept. Her inspiration came from an ancient motto of the congregation, "*Tikkun Olam*," which means "repairing the earth." Upon completion of the building, the congregation withstood record-breaking freezing temperatures to welcome the community into their new home.



*Image: Ross Barney Architects*



Image: Ross Barney Architects

At the urban end of the scale, Marilyn Taylor, FAIA, Partner with Skidmore Owings & Merrill in New York, presented a bold and controversial design for midtown Manhattan, on the banks of the East River. This expansive, mixed-use project is a community within itself, comprised of office, residential, retail, public parks and recreation space, as well as a school. The architects envisioned a mixed-income project for this high-profile location, which includes affordable housing units. While the density of this project is astounding, and required extensive community input and approvals, its careful design provides beautiful, human-scaled public spaces at the street and along the banks of the river. There is no doubt that this project challenged the developer and the community to think beyond buildings and toward an exciting urban vision.



Image: Skidmore, Owings & Merrill

Having seen the impact of these three projects, it is reasonable to assume that we as architects have not only the ability, but the *responsibility* to move our profession toward added value in ways that we have yet to imagine. Beginning with AIA National, we must accept the challenge to "*demonstrate our inseparable position within the most pressing issues of our time*" by supporting this vision and by making it happen in our communities and in our own firms. Local AIA chapters must find a way to support added value in their regions. We can do this by:

- Interfacing with key policy-makers in local governments
- Coordinating efforts with related business organizations
- Becoming a resource for the press
- Highlighting member projects that improve communities
- Promoting the role of the architect in high-profile projects
- Forming advocacy committees

At the level of our firms, we must provide added value to our clients. We can do this by:

- Creating great design
- Producing great documents and details
- Making money for ourselves and our clients
- Getting involved in community organizations
- Volunteering our services for social causes
- Promoting our work and that of other architects
- Seeking new ways to add value for our clients and communities

It is not necessary for us to become unreasonable in order to make progress, but it will take sustained involvement, leadership and a lot of passion for what you do.

*"...Therefore, all progress depends upon the unreasonable man."*

*Hiickok Cole Architects* is an architecture, interior design, master planning and housing firm in

*Washington, D.C.*

*Please click [here](#) for a pdf of the firm's continuing education session, on which this article is based, from the 2008 AIA Convention in Boston.*





# Practice Management Digest

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## ***Tethered Millennials: Training the Net Generation***

by Meg Brown and Cliff Moser

In *Generations* (1991), Strauss and Howe proposed the theory of generational cohorts, where every generation of twenty or so years reacts to and is part of the previous generation's systems and framework.

In 2000 they published *Millennials Rising*. This work investigated the emergence of the Millennials, born 1982 to 2001, and their relationship and involvement with their previous generations, the Boomers and Generation X (GenX, or Xers). In contrast to the downbeat and alienated youngsters familiar to their own childhood, Strauss and Howe suggested that this new generation would be engaged and upbeat. They accounted this to their "Generational Awakening" theory, casting Millennials as the next great generation, even comparing their potential to the last great generation, that of the GI WWII vets.

In developing this theory, Strauss and Howe identified four repeating trends which create each generational cohort. These trends are: Civic, Adaptive, Idealist and Reactive. Civic starts the generational trend with the GI generation of WWII. The GIs were born between 1901 and 1924. The Adaptive follows in the next generation, this time Silents, who were born between 1925 and 1942. Boomers are the Idealist trend, born between 1943 and 1960. GenX follows as Reactive between 1961 and 1981. And Millennials then follow to repeat the Civic trend and are born between 1982 and 2001. See the chart below for each Strauss and Howe generational characteristics.

Generational Group	Trend	Birth Year	Characteristics
G.I. Generation	Civic	1901-1924	respond to a social crisis (WWII); focus on common good, Community, rebuilding the world
Silent	Adaptive	1925-1942	flexible; sensitive to diversity (told to 'stay out of the way, we're busy' during WW2). Note: no US president or UK prime minister from this group
Boomers	Idealist	1943-1960	spiritual awakening; aim to 'take things forward'
GenX	Reactive	1961-1981	cynical, pragmatic, questioning
Millennial	Civic	1982-2001	optimistic, success-oriented, conservative
New Silent	Adaptive	2001-2022	Similar to the first Silent?

According to these ideas, Millennials now enter the workplace with an awful

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lot of promise, as well as encumbrances. We list them as the tethered generation, continuing to be raised by their helicopter parents long after they have finished college and entered the workforce. They are also the single pet/children of the Boomers and Xers, raised with not only seatbelts, but side airbags, baby monitors, bicycle helmets, scheduled playdates, and participation trophies. Because of this, Millennials want to be protected, entertained, scheduled, want instant rewards, and expect to run your company (if not rule the world), by their second full week on the job. While Strauss and Howe talk about how wonderful this new "Civic" workforce will be, we, as executives and managers, have to figure out if we need to change the entire workplace to help them in working for us.

Additionally, this is the first time in history that there are four generations active in the workplace. There are Silents, Baby Boomers, Xers and Millennials. With Millennials, it's the other three generations that are feeling forced to change in order to fit the coddled children now in the building.

*Who are these Millennials and what are their promises and challenges?*

As over-scheduled children, Millennials are now experiential learners; they prefer learning by doing, but within a framework of organization. They also have a nomadic communication style, talking to or texting their friends constantly.

Because they are singletons within their immediate families, they respect adulthood, they strive to be learning, respect intelligence and education, and most will go directly onto graduate school. But because of the college requirements, they also come into the workplace with excessive debt from student loans, and want to earn as much as possible to retire that debt.

Millennials are collaborators. After many years of being forced to play nice during playdates, daycares, schools, and soccer teams, they now embrace peer-to-peer networks, social-networking sites, and other structured team activities.

The firm must measure outcome-based performance. If your Millennials are getting the job done faster than anticipated, give them more to do. Don't settle for poor quality, but don't get mad if they are also conducting personal conversations (or watching Youtube) while they're working.

Keep Millennials engaged, because their attitude will be: "if my skills are developing, I'll stay; if not, I'll go somewhere else."

Just as you should have done for your Boomers (long ago), as well as for your Xers, your firm should offer your Millennials multiple mentors and a schedule to help registration for the IDP.

But what about these other generations? The Silents, the Boomers, and the Xers? They're not going away. How can the firm work with this blended community of workers?

According to the Generational Awakening theory, each generational cohort plays its part as an actor in the span of time. Civics focus on the common good and are Millennials and GIs. Adaptives (the Silents) react neutrally against this goodness and tend to stay out of the way and behave themselves. Idealists are the next group and, rather than focusing on the common good, they focus on themselves. This is the "me" generation of Boomers. Reactives look at the mess the self-centered Idealists left and become ironic and cynical. Look at the comedy of Jon Stewart and Chris Rock to see Xer views.

Silents: This is the Korean War vet generation. Born from 1925 to 1942, they were in their 20s and 30s in the 1950s, just in time for atom bombs and cold wars. In this group, only males were in the workforce, while women stayed at home and raised families (94%). Only 22% went to college and in the 1950 and 60s work was in major industries (70% currently have some sort of pension plan (ask your Millennials if they even know what a pension plan is)). In the 1950 and 60s, this group had full health insurance, vacation and sick plans, and company cars. What they didn't have was a safe world. In 1952, at the end of a particular nasty polio epidemic, 58,000 people had been infected, resulting in over 3,000 deaths.

The times make the man. A lot of the resentment to young staff's seemingly insubordinate behavior and demands comes from the background of its leaders.

Baby Boomers. This is the pig in the python for business management. This cohort, born between 1943 and 1960, runs practically everything right now. In late 2008, we've lived life under the Boomer world view since the late 1970s. Defining moments in the 20-year coming of age for the Boomer include Woodstock (of course), Vietnam (58,148 casualties), the birth control pill, and Nixon's resignation. The business world works the way it does today because of Boomers. During their time at the wheel, personal savings has decreased from 12% in 1982 to 0.1% in 2007 (though in 2008 it is back up to 2.5%).

GenX. This cohort was born between 1961 and 1981. These workers followed the Boomers into the workforce and were quickly met with a one-two punch of inflation and recession. Interest rates were 19% during President Reagan's first term in 1981. In addition to the economy, Xers defining moments were the Challenger space shuttle explosion, the Berlin Wall and Soviet collapse, and the first Gulf war. Xer icons were *Less than Zero*, Kurt Cobain, Alf, Herman, and Skeletor. Xers came of age in the 1980s and then wondered what happened in the 1990s.

Xers are the neglected cohort. Just five years ago, in 2003, at the AIA National Convention in San Diego, N. Boyce Appel presented to the PMKC breakfast [his view of generations within the workforce](#). While not pinned against Strauss and Howe's Generational Awakening theory, he suggested that firms treat Xers by following these polite directives:

- Appreciate us. Show you care.
- Be flexible. Let us have a life beyond work.
- Create a team. Give us the family we never had.
- Develop us. Help us to increase our skills.
- Involve us. Ask our opinions.
- Lighten up. Remember, it's not brain surgery.
- Walk your talk. Practice what you preach.

It's amazing how history suggests the same solutions, only five years ago...

*This article is based on the [continuing education session](#) given at the 2008 AIA Convention by Meg Brown and Cliff Moser. Brown and Moser are presenting [a panel on GenX leadership](#) at the PMKC fall conference, and have also created a [podcast](#) on this topic.*

*Like this article? Search [AIA Soloso](#) for more articles on this topic, such as [this one](#) by Rena Klein, FAIA!*





# Practice Management Digest

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## **Not Your Grandfather's Drafting Class**

### **Transforming High School Architectural Education**

by Jennifer Masengarb, Chicago Architecture Foundation, Krisann Rehbein, Chicago Architecture Foundation, Travis Soberg, AIA, LEED AP, Goettsch Partners, and Yamani Hernandez, Chicago Public Schools, Education to Careers

*Follow-up to 2008 AIA Convention / Session TH 29:*

Tens of thousands of high school students across US take an architectural drafting course each year. While students who emerge from these courses often become highly proficient in CAD and rendering software, many students lack both an understanding of architectural concepts and the skills to look critically at the built environment around them. Many high schoolers are also not typically exposed to the design process, sustainable principles, or influential contemporary and historic buildings.

To address this challenge, the Chicago Architecture Foundation (CAF) has recently published *The Architecture Handbook: A Student Guide to Understanding Buildings*. As a college-prep architecture textbook for high school students, the book is the first of its kind and has broad applications for classrooms across the country.

### **CAF + AIA + CPS**

This ground-breaking project-led by CAF- set out to radically change the way that architecture was taught to 1,500 teenagers in the Chicago Public Schools (CPS), the country's third-largest school district. A strong and unique 3-year partnership that brought together AIA members, public high school teachers and students, career and technical education officials, and local universities has led to dramatic curriculum reform.

### **History of the project**

*The Architecture Handbook* grew out of two important factors. First, over the past 26 years, the Chicago Architecture Foundation and the Chicago Public Schools (CPS) have worked closely together to run an architecture competition for Chicago high school students. Throughout the school year, AIA members and architectural interns assist in running CAF's architecture skill building workshops, participate in a series of architect school visits, and serve on the competition's jury.

Second, CAF staff gained experience writing and publishing *Schoolyards to Skylines: Teaching with Chicago's Amazing Architecture*, a K - 8th grade teacher resource book. Published in 2002, the book is used throughout the US and in 6 countries. In 2005 the American Institute of Architects (AIA) honored *Schoolyards to Skylines* with an Institute Honor for Collaborative Achievement.

### **The need for *The Architecture Handbook***

Based on the strength of these two primary factors, CAF opened a new dialogue in August 2004 about the current state of architectural education in the high schools across Chicago. At the time, teachers and students in CPS were using a drafting manual written in 1951, when becoming a draftsman was a viable career path after high school graduation. In the 21st century, however, the skills expected from students in any occupation have changed, from those requiring replication, repetition, and memorization, to skills more relevant to an economy based on innovation, flexibility, and creativity.

### **The people and the process**

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As project initiator and developer, the Chicago Architecture Foundation brought together teams of architects, teachers and administrators, students, and CAF staff to chart a new direction for the curriculum. Over three years, three primary advisory teams came together to brainstorm ideas, develop content, and test lessons and activities.

More than 40 members of Chicago's architectural community volunteered their time and energy to the project. These architects helped inform the content and design of the curriculum and added their valuable professional expertise. Ten of these volunteers were also paired with a CPS teacher to visit their classroom and test out activities from the book.

Ten teachers from Chicago Public Schools participated as part of a pilot team to test the book as it was being written. For two school years, these teachers used a working draft of the curriculum and met monthly to discuss what worked and what didn't work.

From the onset of the project a core of 6 students came to CAF every Monday for an entire school year to test out activities and give feedback. Their input was critical to the success of the materials and the process.

### **Student edition content and features**

*The Architecture Handbook* is organized into 6 projects: The Block Plan, the Site Plan, the Floor Plan, the Elevation, the Building Section, and a Design Project. Chapters within the projects focus on the critical concepts found in each type of architectural drawing.

*The Architecture Handbook* uses the F10 House, an 1800 sq. ft. award-winning green home in Chicago, as its case study building. The house-designed by EHDD Architecture and named as an AIA COTE Top Ten Project- takes its name from the concept that it was designed to reduce its environmental impact by a factor of 10 compared to the average American home.

Sustainability and green architecture are woven throughout the entire book. Students are introduced to issues such as: connections to public transportation, permeable landscapes, floor plan design, passive heating and cooling systems, module construction, green roofs, and recycled materials.

As the theme of the book is "homes on the block," students are also introduced to 10 significant homes in the U.S. and around the world. Each chapter in Projects 2 - 5 compares the F10 House with one of these famous homes and with the student's own home. Students compare and contrast homes by Wright, Le Corbusier, Palladio, Mies van der Rohe, Murcutt, Legorreta, and Perkins+Will.

Throughout each chapter, architecture vocabulary / definitions and an extensive list of resources help students investigate ideas further. The 'On Your Way Home' and 'Talk About It' sections, as well as the 'Try It!' activities, help students make connections to their own world.

Reading and math are integrated throughout the book to reinforce essential student skills. Each chapter includes a 500-700 word reading with comprehension and analysis questions, as well as 10-15 math problems that tie directly to the big architectural ideas.

### **Teacher edition features**

A 600-page teacher edition in a 3-ring binder contains more than 60 hands-on classroom activities.

The teacher edition also includes a CD-ROM with activity image sets, a full set of construction drawings for the case study home, and four integrated projects: social sciences, life science, language arts, and chemistry.

To find out more about the textbook, see sample lessons and a table of contents, or order copies, please visit [www.archhandbook.org](http://www.archhandbook.org)

### **Contact Information**

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# Practice Management Digest

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## ***Integrated Project Delivery and the Fully Engaged Emerging Professional***

by Zigmund Rubel, AIA

Integrated project delivery (IPD) has equal promise for the emerging professional and the industry it is transforming. IPD integrates people, systems, business structures, and practices to harness the skills and insights of all participants.

### *A Call for Leadership*

IPD allows for rich interactions on all levels. IPD's richest transformative quality is how it enables emerging professionals to be valued, mentored, and engaged in building facilities of the future. Beyond nurturing, IPD enables gifted individuals to lead the project delivery process. Throughout the media, 'Generation Y' is described as the team generation. "A Gen-Y leader is inclusive and collaborative, and not just within their sphere of influence" ("Being a Gen-Y Leader" by Rebecca Thorman, July 29, 2007, *Work, Entrepreneurship, Work/Life, Career Development*). *The AIA/AIACC IPD - A Guide* identifies the need for additional team members under IPD, one of which is the integrated project delivery coordinator. This individual facilitates "coordination, organization and direction" of the project team, skills often found among younger emerging professionals of Generation Y. The emerging professional is poised to take on this role. Our industry is transforming, and emerging professionals will benefit from IPD as they are mentored, access one-on-one relationships with building industry professionals, and help their firms provide value to design and construction processes.

### *Mutual Respect-the Premise for IPD*

Equality allows all participants to contribute meaningfully. IPD is built on collaboration, which in turn is built on trust. Junior designers and technical professionals provide the digital exchange currency representing the architect's value to the IPD process. Building information modeling (BIM) is not IPD; however, IPD is enhanced by BIM. The intelligence of the BIM is more crucial in an IPD world, because it allows for visualization, performance-based design analysis, quantity take-offs, interference checking, code compliance analysis, virtual rehearsal of the construction, and the beginning of the lifecycle model for the owner to manage their facility. At many firms, the emerging professional is teamed with a senior architect to ensure this value of the BIM. This teaming ensures cross-mentoring and emerging professionals are respected in an IPD paradigm.

### *What Comes First-the Project and Your Relationships Take Center Stage*

IPD is causing the common language of the AIA to change:

- Predesign becomes conceptualization
- Schematic design becomes criteria design
- Design development becomes detailed design
- Construction documents become implementation documents
- Agency review begins at conceptualization
- Bidding becomes buyout
- Construction is still construction

The phase name changes recognize that our profession needs to work differently to deliver buildings better. With the project constituents, the project team can make timely and more informed decisions to bring the best value. One of my mentors told me that my relationship is with the project. I

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did not know what that meant at the time, but it soon became clear that the value of my interactions with our consultants, the client, builder, and trades was not only a value to me but also a value to the firm. IPD intrinsically has these relationships built into the delivery process.

