

AIA ARCHITECTURE PRACTICE PRIMER

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1. INTRODUCTION

A. Why you need to use this

1. It's not a game

2. THE PROFESSION AND THE LAW

A. Choosing a Lawyer

B. Legal Structures & Tax Considerations

1. Unincorporated Businesses
 - Sole Proprietor
 - Partnership
2. Corporation
 - C Corp
 - S Corp
3. Limited Liability Companies
 - LLC
 - LLP

C. Insurance

1. Professional Liability
2. Comprehensive General Liability
3. Worker's Compensation and Employer's Liability
4. Automobile Liability Insurance
5. Health Insurance

D. Professional Licensing

1. Initial Licensing
2. Comity / Certification / Reciprocity
3. State Registration Boards
4. NCARB
5. Practicing Abroad
6. Continuing Education

E. Copyright Law

F. Ownership Transition

G. Ethics and Professional Conduct

1. Public trust is mission critical
2. AIA Code of Ethics, Obligations to the:
 - a) Public Client
 - b) Profession
 - c) Colleagues

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- d) Environment

H. Participating in Professional Organizations

- 1. AIA Components
 - The Institute
 - State Chapter
 - Local Chapter / Section
 - Knowledge Communities
 - Member Groups
 - Advisory Groups
- 2. Collateral Organizations
 - ACSA
 - AIAS
 - NAAB
 - NCARB
- 3. Related Trade Associations
 - CSI
 - USGBC

I. Public Service and Community Involvement

3. BUSINESS PLAN

A. Executive Summary

B. Vision, Mission, Values

- 1. Experience, Efficiency or Expertise-Based
- 2. Price, Speed or Quality: Delivery of all?
- 3. Goals & Objectives
- 4. Entrepreneurship
- 5. Inspiration, Drive, Ambition

C. Industry Analysis

- 1. Trends
- 2. External Market Conditions and Competition
- 3. Architect-Led Design Build
- 4. Architect Developer

D. Financial Plan

- 1. Operating Budget

E. Marketing Plan

- 1. Marketing Principles
 - Overt Benefit: What are you offering?

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- Real Reason to Believe: How are you going to deliver?
- Dramatic Difference: Why should the Client care?
- 2. Marketing Budget
- 3. Seeking Professional Marketing expertise
- 4. Image and Brand
- 5. Target Audience
- 6. Target Markets
- 7. Key Differentiators
- 8. Relationship Marketing
- 9. Networking and Promotional Opportunities
- 10. Social Media
- 11. Public Relations

4. MANAGEMENT

A. Leadership

- 1. Firm Culture
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 - Control vs. Wealth
 - Career Satisfaction
- 2. Firm Business leadership
 - Identifying business skills
 - Rainmaking
 - Growth strategies
- 3. Plan Non-Billable Hours
- 4. Working with Creative People
- 5. Effective Firm Retreats

B. Practice Models

- 1. Solo Practitioner
- 2. Married Partners
- 3. Partnerships that Succeed
- 4. Partnerships that Fail
- 5. Small Firms in International Practice
- 6. Virtual Firms

C. Financial Management

- 1. Planning
 - Operating Budget (Profit Plan)
 - Direct Salary Expense and Multipliers
 - Minimum Hourly Billing Rates
 - Utilization and Realization Rates
- 2. Pricing and Negotiation
- 3. Reimbursable Expenses and Markup

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4. Maintaining Financial Health
5. Acquiring Capital
6. Invoicing
7. Collections

D. Project Management (should we separate “Office Management” from “Project Management”?)

1. Effective Management Techniques
2. Project Startup
3. Delegating
4. Scheduling
5. Resource Allocation
6. Quality Control and Project Tasks
7. Internal Budget Control
8. Project Changes
9. Consultants
10. Offering your consultants’ services
 - (1) Pass through
 - (2) Owner Direct Hire
11. Working with the Owners’ Outside Consultants
12. Construction Cost Management

E. Client Management

1. Developing and Maintaining Relationships
2. Client Types
 - Single Family Residential
 - Mom & Pop Retail
 - Franchisees
 - Commercial Developers
 - Institutional
 - Public Entities
3. Communications
 - Listening
 - When there are problems
 - Negotiating
4. Basic Scope of Services
5. Supplemental, Contingent, Additional and Uncompensated Services

F. Human Resources

1. Legal Requirements
2. Employee Handbook
3. Recruiting and Hiring
4. Staffing Alternatives
 - (a) Direct Hire
 - (b) 1099 Consultant

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- (c) Using a Staffing Company
- New Employee Orientation
 - Job Descriptions
 - Compensation and Employee Benefits
 - Employee Reviews
 - Termination, Resignation and Exit Procedures
- 3. Other Considerations
 - Staff Development and Retention
 - Mentoring

G. Technology and Integrated Practice

1. Financial Software Systems
2. Project/Office Management Systems
3. Mobile Apps
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6. Twitter
7. Hardware and Software Considerations
8. Cloud Computing
9. BIM / Integrated Project Delivery

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Steven Burns writes:

I understand the YAF is looking for a portal for their website. While this is possible I would prefer to take the final content and deliver it to AIA members in the form of an App (iPhone, iPad, Android). The benefit of an App is that the content is always within reach and by their very nature Apps have the ability to be frictionless and proactive.

For example, as an App, we can use Notifications to deliver daily or weekly thoughts of value to our members. Another example is that an App can be given permission to access the calendar and see an event coming up such as a client interview. The App might then know to send the architect a thoughtful reminder 24 hours in advance about strong negotiating tactics – or a video on how to present your firm (both are content articles in our database)

Whether an App or a web portal, the architect must login. This is not only to protect the content's copyright, but also to manage user settings, bookmarks, areas of interest, etc.

I can see architect's setting their user profile to include areas of expertise and giving permission for other members to contact them for consultation or advice. Members can go to a section of the App that provides members who meet certain expertise criteria and then communicate directly with them (similar to LinkedIn).

The App can run polls regularly. Members who answer the poll question will be given the current response results and when a poll is over, the final results will be available. An example would be "What is the average number of days your clients takes to pay your invoices?"

Ultimately, the content would also provide guidance and not just be a Wiki of information that can be searched. Architects don't always know what to look for, or even why they should look. Instead, if the content is designed with a powerful Table of Contents that is easily digestible, members will be able to continue to learn. It's not a book you read and when completed, forget 99% of. It's a living document that makes users visit it frequently. This will continue to raise the bar for how Architects provide services and improve the profession overall.

The App must be FUN. Because a lot of the content is dry information, there needs to be an engaging aspect. For example, Polls (mentioned earlier), are engaging and fun. But so are games such as "Identify the Building" or "Name that Architect". Illustrations accompanying all content should be amusing. There will be a style to the product.

As an App, we can take an interesting article or video and share it with a colleague.

I expect the content to be written by dozens and dozens of qualified members and associates. For example, legal articles from the TOC can be provided by attorneys who specialize in the topic. Given attribution at the top and bottom of the article with a link to email them and visit their website will be provided to encourage participation.

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David Del Vecchio writes:

I agree with the idea of offering an App. I especially like the idea of creating some sort of participant feedback, survey, “game”. People tend to “buy in” to an idea when they participate in creating the product.

“Content is King, but Context is the Kingdom.”

We need to position ourselves as “curators” and “moderators” of the information, rather than as a pure research institute. I don’t think we have the resources to create something that completely replaces existing social media platforms, but we can augment the current experience. I believe we should also consider making the connection to existing AIA Social Networking platforms: the Knowledge Net, AIA Face Book, AIA LinkedIn, AIA Twitter, or at the very least plan on how to transition members to the App Toolkit.

Can we somehow use this app to connect to what’s happening at State and Local Chapter component Roundtable’s?

Videos, Podcasts, etc. should be short enough that someone can participate while eating lunch, waiting in line at the movies, waiting for a table at an eating establishment, while eating breakfast (and there’s not a copy of the NY Times around), or while attending a boring lecture or conference.

“Day in the Life”, member video profiles, testimonials, interviews, panel discussions, and our own convention programs could be good source material; but we need to figure out how to produce them at acceptable production values for next to nothing. Jean Dufresne has been producing low budget “Value for the Architect” videos using iPhone. I think this is an opportunity to cross pollinate with his work.

I like Conan O’Brien’s app where you can watch his show while following along on your iPad. I think that kind of thing appeals to our younger members who fancy themselves as multi-taskers.

We also need to consider how this information is transmitted to less technically literate members.

Sara O’Neil-Manion writes:

Start writing here.

Leonard Kady writes:

I picture an energetic delivery and the sense that very experienced professionals are saying I have been there trust me I know what success looks like.

I also picture recognizing the audience’s diverse goals. Some may want to create a big firm in time, others may always want to stay small but earn high margins, some will look at building equity in their business, others lifestyle control with respect to hours, family, other personal goals, etc. It’s important

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to lead with recognition of a variety of interests and be inclusive because ultimately the reader will say what does this have to do with me? Why is the AIA doing this? Could this be a gold mine and secrets for successfully running a firm?

Peer to peer live support is important.

Highlight cross industry alliances for business. Stress leaving one's comfort zone (pencil, drawing table) and getting out there to learn how others do business and why?

Tool to get the financial facts about the profitability and prospects in Architecture and how to create opportunity. Pit falls of our market and clients knowing this and taking advantage of it.

Entrepreneurship!!