



The American Institute of Architects
Small Project Practitioners
Knowledge Community

Round Table Toolkit

A Model for Sharing Knowledge



The Small Project Practitioners (SPP) Knowledge Community aims to develop knowledge and information to benefit architects who are engaged in the practice of, or who are interested in, small project work. SPP presents information and exchanges knowledge and expertise to promote the professional development of its members via publications, local seminars, and member interaction.

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Introduction

“We are drowning in information but starved for knowledge.”

–John Naisbitt (Megatrends: Ten New Directions Transforming Our Lives)

The speed at which new information and technologies develop often exceeds our ability to absorb and effectively use the information. This poses a particular challenge for the small project practitioner, who is often already overloaded with current technology and multitasking efforts.

The Small Project Practitioners (SPP) Knowledge Community aims to develop knowledge and information to benefit architects who are engaged in the practice of, or who are interested in, small-project work. SPP presents information and shares knowledge and expertise to promote members’ professional development via publications, local seminars, and member interaction.

One goal of the SPP Knowledge Community is to provide educational and informative material that is up to date, practical, and directly relevant to the success of small architecture projects. This information will encourage individual study and group discussions at the local level. SPP also strives to provide convenient educational information that provides continuing education credits without the requirement of convention attendance.

With these goals in mind, we created this guide to help local chapters and individual members create their own sharing network.

Who	AIA architect members and other interested parties in your geographic area whose practices include small projects.
What	A dynamic, flexible, interactive setting to facilitate the sharing of knowledge relevant to a small-project practice.
When	Quarterly gatherings are the recommended minimum, but a round table may meet more or less often, depending on the round-table members’ needs and wishes.
Where	To be determined by the members of the round table.
How	Using this guide as a start, a member of the local component plans and conducts sharing sessions relevant to local members.
Why	Because the old adage is true, “a rising tide lifts all ships.” Because by sharing with others, we help ourselves. Because round-table programs often qualify for continuing education.

How to Start and Sustain a Successful Round Table in 10 Easy Steps

“Try not. Do or do not. There is no try.”

- Yoda

The single most important step to take when forming a round table is to just do it! Too often, organizing efforts fail because of the belief that a new initiative must have a large participating membership or a complex and complete organizational structure. The guiding philosophy when starting a round table is more closely related to this paraphrased movie line: “If you host it, they will come.”

While the ways to begin any endeavor are numerous, experience shows that the two actions producing the best results are to plan regularly scheduled gatherings and to tell all interested parties when the meetings will be.

As in many worthwhile endeavors, a successful round table begins with one interested party taking ownership of the idea. This guide was developed to be a road map and a toolkit for beginning a successful round table. A step-by-step guide and sample forms are included.

If your component already hosts a round table, that’s great. Think of this toolkit as affirmation of what you’re doing already, and if your group has not yet linked with the SPP Knowledge Community, consider doing so today. There are instructions below and in the FAQ section.

Step 1. Commit to hosting an inaugural/organizational round table. Enough said.

Step 2. Find, select, or draft a local advisor. Local advisors are the backbone of the network connecting small project practitioners nationwide. They organize local round tables and forums to provide collegial support, brown-bag lunches, and experience- and knowledge-sharing for small project practitioners. Local advisors are also instrumental in soliciting and submitting articles for the SPP Journal.

Step 3. Make contact with the local or state component leadership. If the idea of beginning a round table did not originate with the leadership of the AIA local component, contact them. The state and local AIA components are vital resources for obtaining a current directory and e-mail list of members and for help in publicizing meetings. The chapter leadership may include others who want to take a role in organizing the round table.

Step 4. Gather an interest group. Round up a core posse of members who can help give the process a good start. This group should be five or more in number. The posse is a source for ideas and resources for the group and helps prevent burn-out from members feeling alone in the process.

Step 5. Schedule the inaugural meeting. Using your posse as a sounding board, pick a convenient date, time, and place for the first meeting. The two most popular times for round tables are during an extended lunch and right after work. However, it is important to pick what works best for your group. The same thing goes for the place; if the local component has meeting space, groups may find it convenient to meet there. Meeting at a member architect's office is equally good, as is some neutral spot. Convenient central locations, easy access, and parking are also factors.

The first meeting of any group requires handling some organizational issues, such as choosing the what, when, where, and why of the meetings. The group will also need to discuss who will act as the initial contact/organizer and for how long. A sample agenda for the organizational meeting is included in the Tools section; in step 7, the details of the agenda are discussed.

Step 6. Publicize the inaugural meeting. This is a key step: interested members can't attend what they don't know about. Announce the meeting at the local chapter meeting; have an announcement run in the local chapter newsletter; send an e-mail announcement

Step to a Successful Round Table

1. Commit to hosting a round table.
2. Find, select, or draft a local advisor.
3. Make contact with the state and local component leadership.
4. Gather an interest group.
5. Plan the organizational meeting.
6. Publicize the organizational meeting.
7. Host the organizational meeting.
8. Present the results of the organizational meeting.
9. Affiliate your round table with the Small Project Practitioners Knowledge Community.
10. Keep it going!

or reminder to members of the local AIA. Have a member of the initial interest group make phone calls to potential attendees. Notices should be frequent, with the final notice given the day before the event.

Step 7. Host the inaugural meeting. An organizational meeting is held at an announced location and all area members are invited and encouraged to participate. The location for this meeting can be an office of one the members or a centrally located meeting place. Since attendance will be unpredictable at first, refreshments should be limited to those where quantity is flexible without waste and/or provided on a cash basis.

Nametags are often a good way to foster communication. These don't have to be expensive; labels with handwritten names work as well as preprinted ones. A sign-in

sheet is a great way to get member information; a sample sign-in sheet is included in the Tools section.

Just as every building needs a plan, every meeting needs an agenda. Regardless of how simple it may be, an agenda lets attendees know that the group is organized and has a purpose and objective, and it keeps everyone focused. A sample agenda for the first meeting is in the Tools section; feel free to change the agenda, but HAVE one!

The first item on the agenda is for the coordinator to call the meeting to order. The meeting coordinator may be the local advisor or a member of the posse drafted to serve this function. The coordinator should welcome the attendees and thank them for coming.

The next item on the agenda is to go around the room and have everyone introduce him- or herself and check in; you can also have the group do a warm-up activity. This simple process allows everyone in the group to get to know one another, fostering collegiality. The check-in and warm-up time also allows group members to successfully transition from their activities leading up to the meeting to focusing on the meeting. Sample check-in questions and warm-up activities are included in the Tools section.

At the first meeting, you may want to share why you initiated this meeting and what you would like to see happen and ask the attendees why they came. This will get the group primed for the brainstorming session later in the meeting.

Following the check-ins is the Knowledge Community commercial. This is the point in the agenda when you state the gathering's purpose and remind the group of any upcoming opportunities or dates, such as a convention date or the topic and submission deadline for the next SPP Journal. The purpose of the gathering can often be summed up in one sentence; this is the sentence existing groups post on their component Web sites. It may read like this: "This SPP round table addresses the unique issues related to small-project and small-firm practice. As a forum, it provides for the exchange of ideas, concerns, successes, failures, resources, and more that affect practice in a small firm." It's a good idea to incorporate this statement into the written agenda.

The next part of the meeting is setting the meeting norms, which help groups work together in an agreed-upon manner. The norms that need to be discussed at the first meeting include the frequency, format, date, time, and location of future meetings. Additional norms may relate to participation (e.g., AIA members are free, but others must pay a small fee to attend), sharing (e.g., everyone attending must offer something, no sponging and leaving), and confidentiality. Still others may address creature comforts, like snack and drink provisions.

Along with the meeting norms, it is critical at this first meeting to have a brainstorming session on the topics, issues, and concerns round-table members want discussed. The list may be extensive enough to require that some time be spent prioritizing it. This may be when the group decides if the topic is for round-table discussion only, pulling expertise from the members, or if they want to solicit an outside expert to come discuss the issue with the group. Of course, depending on the topic, the meeting format may change from inner-circle discussion to presentation and facilitated discussion. What's most important is to do what works, to do what benefits the members of the round table. Included in the Tools section is a list of common issues facing small project practitioners. This list may serve as a catalyst for discussion.

A sample agenda for regular meetings is also included in the Tools section. It was designed to accommodate planned discussions, leaving time at the end of the meeting for members to bring up issues and concerns that are important to them at that moment.

Before the meeting ends, it is important to recap the norms and to set the schedule and topics for the next few meetings. This will help members save the dates, and the published schedule is a great public relations tool. It is a good idea to ask for volunteers to arrange for future speakers, hand-out materials, contacts, and food and beverages.

Finally, the coordinator adjourns the meeting.

Step 8. Present the results of the organizational meeting. As soon as the organizational meeting is finished and the dates, topics, and individual assignments for the next series of meetings are set, send this information to your local component and ask that the information be included in the component's newsletter and meeting announcements and on its Web site. Include the round-table purpose statement so component members understand the round table's objectives. If you really want to kick it up a notch, give them a testimonial about how great it is to participate!

Step 9. Affiliate your round table with the SPP Knowledge Community. After your first meeting, affiliate your round table with the SPP Knowledge Community by calling AIA Member Services, 800-242-3837. Individual members may designate SPP as one of their Knowledge Communities by calling the same number. By affiliating your members and round table with the SPP Knowledge Community, your group gains resources and receives e-mails about new journals, learning opportunities, and opportunities to participate in the larger SPP forum nationally.

Step 10. Keep it going. Once you get the ball rolling, the amount of energy needed to keep it rolling is greatly reduced, but focus and energy are still needed. Delegating duties and sharing responsibilities not only prevent burn-out, but also increase leadership capacity, organizational learning, camaraderie, and the chances for success. Before, or at least by, the final scheduled meeting, set aside time on the agenda to set dates for the next round of meetings. This is also a good time to reflect on how the format has or has not worked for the group and to make adjustments. Keep it fun, flexible, dynamic, and relevant.

Keep a log of your round-table activities. Record the who, what, when, where, why, and how of your group, so as new leaders take the helm, a history is in place of where the group has been, how it got there, and where it is headed. This is also a great tool to share with other components in your state or region to assist them as they develop their own round-table program.

Frequently Asked Questions

Communities, Groups, Advisors, oh my . . .

Q. What is a Knowledge Community?

A. Knowledge Communities are groups of people who share common challenges, opportunities, or a passion for a given topic and who collaborate to deepen their understanding of that topic through ongoing learning and knowledge sharing.

Q. What is the Small Projects Practitioners Knowledge Community and what do they do?

A. The SPP Knowledge Community aims to develop knowledge and information to benefit architects who are engaged in the practice of, or who are interested in, small-project work. SPP presents information and exchanges knowledge and expertise to promote the professional development of its members via publications, local seminars, and member interaction.

Q. What exactly is a small project practitioner and how do I know if I am one?

A. That's an excellent question and one that even the leaders of the Knowledge Community grapple with frequently. Until we come to a firm definition, if you feel your projects or firm are relatively small, "Welcome aboard."

Q. What is the SPP Advisory Group (AG)?

A. The SPP Advisory Group is a five-member board consisting of two at-large members, a vice-chair, a chair, and a past chair. The AG works to provide strategic planning, knowledge generation, member services, and networking activities to serve the small-project/practice community. Each AG member also chairs a subcommittee that supports a specific area of SPP work. The position on the AG is typically a five-year commitment, with the last three years served as vice-chair, chair, and past chair. Each year requires a separate appointment, and although some expenses are covered, out of pocket expenses should be expected.

Q. What are local advisors?

A. Local advisors are the backbone of the network connecting small project practitioners nationwide. They organize local round tables and forums to provide collegial support, brown-bag lunches, and experience- and knowledge-sharing for small project practitioners. Local advisors are also instrumental in soliciting and submitting articles for the SPP Journal.

Q. How can I become a local advisor?

A. The call for becoming a local advisor can be found at www.aia.org/spp. The application process involves submitting a letter of interest and a professional resume.



Q. Can I be an individual member?

A. Yes, you can be an individual member. Before you forget, send an e-mail to Membership Services at memberservices@aia.org stating you would like your AIA membership to include membership in the SPP Knowledge Community. By the way, as a member of the AIA, you are entitled to become a member of any Knowledge Community at no charge; learn of other Knowledge Communities online at www.aia.org and join those that interest you. It's a great way to increase your knowledge and better your practice, which in turns betters our organization and our communities.

Q. Why should I join the SPP Knowledge Community?

A. Registering with the AIA as a member of the SPP Knowledge Community ensures that you receive all the mailings and notices sent only to members, including announcements and invitations for SPP exclusive events! Also, since the SPP Knowledge Community aims to serve you, you can use SPP to amplify your voice to the larger architectural community.

Q. What is a small-practitioner round table?

A. A small-practitioner round table is a dynamic, flexible, interactive gathering designed to facilitate knowledge sharing relevant to a small-project practice. SPP aims to expand and formalize roundtable networks so that it includes all AIA local components.

Q. Why host a small-practitioner round table?

A. Because the world needs more small practices that are steeped in excellence.

Starting a Round Table

Q. How do I start a round table?

A. Read this guide and "just do it."

Q. How do we get the word out about the round table?

A. There are a number of ways to get the word out. Make announcements at chapter meetings, post the schedule on the chapter Web site, and send out e-mail meeting notices and reminders. Have core members call others who may be interested to personally invite them, and ask all who attended the first meeting to bring someone to the next meeting.

Q. How often should the round table meet?

A. Quarterly gatherings are the recommended minimum, but a round table may meet more or less often, depending on the needs and wishes of the round-table members.

Q. How will expenses be managed and paid?

A. Unless it's funded by the local or state component or paid for by the individual round table, there is no central funding source for round-table business. Some components have secured underwriting by vendors for the round table's activities.

Linking to the SPP Knowledge Community

Q. Why affiliate our local gathering with the SPP Knowledge Community?

A. By affiliating and communicating with SPP, you have a direct line to the AIA, helping it work toward better serving its members' needs.

Q. Our local component has a committee that functions with a similar purpose and format, but under a different name. Can our group affiliate?

A. Absolutely. The overarching goal is to create a knowledge network for AIA members with small-project/small-firm practices. As Will Shakespeare said "A rose by any other name would still smell as sweet." We agree.

Q. What is the possible downside of linking with the SPP Advisory Group?

A. None! The SPP Advisory Group is not about dictating content to local round tables. Think of the AG as a peer-to-peer network. Each round table maintains its own integrity and the much-needed freedom to respond to the ideas and issues of its constituency. By linking to the Advisory Group, you take lone voices and combine them into a symphony.

Q. What resources are available to the local round table?

A. Resources include the AIA SPP Web site (www.aia.org/spp), the SPP Knowledge Community online journals, other Knowledge Communities' online journals, and other local advisors.

Q. In what ways can local members participate with the SPP Knowledge Community?

A. Individuals can author articles and practice tips for the SPP Journal or suggest topics. They can also submit ideas to SPP Advisory Group members, attend SPP activities at the AIA National Convention, and volunteer to serve the SPP as a local advisor or a member of the advisory committee.

If you have any questions about the
Small Projects Practitioners knowledge community
or about starting a round table,
contact:

smallprojectpractitioners@aia.org

Round Table Tools



Sample Organizational Meeting Agenda

Small Project Round Table

Organizational Meeting

[Date, Time, Place]

Call to order and welcome

- Sign-in sheet, with phone numbers and e-mail addresses
- Nametags (optional)

Introductions/ice breaker

Knowledge Community commercial

Meeting norms and brainstorming future topics

- Frequency
- Format
- Confidentiality
- Date
- Time
- Place
- Host/coordinator
- Snacks
- Cost
- Participation
- Brainstorm future topics, i.e. what's bugging you?
- Volunteers

Schedule recap, volunteers for the next meetings

Adjournment

The Small Project Practitioners round table addresses the unique issues related to small-project and small-firm practices. As a forum, it provides the exchange of ideas, concerns, successes, failures, resources, and more that affect practice in a small firm.

Sample Regular Meeting Agenda

Small Project Round Table

[Date, Time, Place]

Call to order/welcome [3 minutes]

- Sign-in sheet, with phone numbers and e-mail addresses
- Sign-in on AIA Continuing Education Form B (if applicable)
Note: If the program is qualified for continuing education credits, AIA Form A should be completed before the program and submitted to the local or state component at least two weeks before the event.
- Nametags (optional)

Introductions/ice breaker [5–10 minutes]

Knowledge Community commercial [3 minutes]

Round table on selected topic [30 minutes or more]

“What’s bugging you?” [10 minutes or more, plus time remaining after topic]

Announcements/reminder of next meeting and topic [2 minutes]

Adjournment [2 minutes]

The Small Project Practitioners round table addresses the unique issues related to small-project and small-firm practices. As a forum, it provides the exchange of ideas, concerns, successes, failures, resources, and more that affect practice in a small firm.

Yearly "We're Alive" Form

Small-Project Round Table Annual Report

August 1, _____, to July 31, _____

DUE: August 15

E-mail, mail, or fax copy to SPP

smallprojectpractitioners@aia.org; Fax: (202) 626-7518

Round Table
Name: _____

Component Name, City Or Region,
State: _____

Local Advisor
Name: _____

AIA Member: Yes / No _____ AIA Member # _____ Term dates _____ to _____

Address:

Phone number:	()	E-mail:	
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Additional Local Advisor Name (if
applicable): _____

AIA Member: Yes / No _____ AIA Member # _____ Term dates _____ to _____

Address:

Phone number:	()	E-mail:	
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Additional Local Advisor Name (if
applicable): _____

AIA Member: Yes / No _____ AIA Member # _____ Term dates _____ to _____

Address:

Phone number:	()	E-mail:	
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Small-Project Round Table Annual Report (cont.)

1. List (or attach) the calendar of activities for the upcoming year:

Date

Activity Planned

2. What were the best round-table programs/discussions held in the past?
 3. What are the top issues, topics, and concerns for your round table?
 4. What areas would your round table like to see addressed during an AIA convention, small-firm breakfast, grassroots, or other workshop?
 5. What articles or practice tips were submitted to SPP by your members during the past year(s)?
-

Top Issues Affecting Small Project Practitioners

You speak, we listen! The members of the SPP Advisory Group are architects just like you. And just like many small project practitioners, we struggle to keep abreast of new technologies and trends, all while working to earn a living in the profession we love so much.

The SPP Knowledge Community is working hard to develop knowledge and information to benefit architects who are engaged in the practice of, or who are interested in, small project work. SPP presents information and exchanges knowledge and expertise to promote the professional development of its members via publications, local seminars, and member interaction.

SPP invites you to join us as we share information and knowledge on the issues affecting you and your practice. A large percent of architects work in a practice that includes small projects; if you haven't joined our Knowledge Community, do so today. Knowledge is power and there is power in numbers! Tune in and turn on to your Knowledge Community.

Top Issues Affecting Small Project Practitioners

- Litigation and affordable professional liability insurance
 - Contracts, documents, and support materials targeted for the small project practitioner
 - Educating clients and the larger community about the benefits of using an architect
 - Design-build as an alternative
 - Office management models and profitability
 - Project delivery models that are successful production methods vary from project to project
 - Work flow scheduling—how to level out the scheduling of projects—and when it is necessary to turn down work
 - Advice and comments in a small practice: there is a need for professional feedback on a daily basis
 - The need for a metric to qualify potential hires and the skills they possess—or don't.
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