Excellence in Design Firm Management **SDA**

Orange County

THE COMMENTARY

Spring 2013 Edition

A Newsletter of the Society For Design Administration

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President's Corner

By Penny Nelson, President

The Orange County Chapter of SDA is turning 30! Our chapter was organized back in 1983. I am very honored and excited to follow in the footsteps of the amazing people who have served as President of this chapter over these past 30 years. It's my desire to serve this chapter with the same commitment to excellence they exemplified.

Thirty years is a long time, especially in the business world. In the 1983 office, your typewriter was the tool you turned to daily, and carbons were not your friend. You were fortunate if you had a "memory" typewriter, and truly one of the lucky ones if you had a PC. In my office in 1983, there was one PC shared among all of the administrative staff in the office. My documents were stored on a "floppy" disc, which didn't hold much, so I had several. Most of us used Word Perfect for our word processing, and VisiCalc for spreadsheets – Microsoft Word was just developed, and Excel, well, that came after Lotus 1-2-3. Computers ran on MS-DOS, and typing "C:\" was the way you started every program. Windows was still two years away. The internet was in its infancy, and if you wanted to talk on the telephone, you couldn't do that from your car. Ronald Regan was president, Michael Jackson introduced us to the "moon walk" and *Thriller*, and McDonalds hooked America on its *McNugget.* One hundred twenty-five million of us watched the last episode of *M.A.S.H.* at home, and in the theaters we thrilled to *Return of the Jedi*, or laughed through *Tootsie*. We saw the first woman and first African American go into space aboard the Challenger, and we cried over the loss of singers Karen Carpenter and Dennis Wilson of The Beach Boys. We did all of this in our BIG hair and big makeup.

While we've come a long way in 30 years, we all have a lot of growth yet in us, and SDA can help you grow. We have a great lineup of educational seminars for 2013, and it's my hope that you will make it a priority to join us as often as possible. Each topic is geared to helping you with your personal and professional growth. We will continue meeting throughout the year at the Lutron Event Center, which has proven to be an ideal venue for our monthly seminars.

I hope many of you are planning to attend EdSymposium13, SDA's national convention. This year it will be held in historic Williamsburg, Virginia. The seminars provided during the convention are impressive and offer many

(Continued on Page 3)

Upcoming Events

May 2013

May 2 — **Business Meeting 5:30 pm**
Meeting will be held at Thomas, Schawrz & Postma, Inc., hosted By Nancy Burt

May 15-18 — **EDSymposium 2013**
Williamsburg, Virginia

May 23 — **Luncheon Meeting 11:30 am**
SDA EDSymposium recap: Members who attended EDSymposium will provide us with summaries of the educational seminars they attended.
Lutron Event Center, Irvine

June 2013

June 6 — **Business Meeting 5:30 pm**
Location to be announced

June 20 — **Luncheon Meeting 11:30 am**
"How to Write Effective Performance Reviews," presented by Mike Deblieux, SPHR-CA
Lutron Event Center, Irvine

Looking Ahead

Sept. 1-29 — **Canstruction**
South Coast Plaza

December 8 — **Annual Holiday Party, Installation of Officers, Gift Exchange**—Palermo Residence

Job Board

Did you know that SDA maintains a Job Board? This includes persons looking for work as well as firms looking for qualified personnel in the A/E industry. Most of the positions are for administrative staff, as AIA maintains its own job board for licensed architects. If your firm is looking for a person with certain qualifications or if you know someone who is looking for a position in an A/E firm, please contact Betsy Nickless by e-mail at betsyn@msa-arch.com.

May 23	Diane Sommerville
May 28	Helen Palermo
June 16	Brittany Choisnet
June 16	Marcy Fields

President's Corner

opportunities to *Learn-Lead-Network-Succeed*, this year's convention theme. The convention will also include the installation of our own Betsy Nickless as SDA National President. Betsy was one of the founders of our chapter 30 years ago, so it's fitting that she takes the reign nationally this anniversary year.

I am looking forward to the remainder of 2013 and hope this is a great year for each of you and for SDA.

New I-9 Form

The new Form I-9, Employment Eligibility Verification Form, is now available.

Purpose of Form :

Form I-9 is used for verifying the identity and employment authorization of individuals hired for employment in the United States. All U. S. employers must ensure proper completion of Form I-9 for each individual they hire. This includes citizens and noncitizens. The form must be completed by both employers and employees.

On the form, an employee must attest to his or her employment authorization. The employee must also present his or her employer with acceptable documents evidencing identity and employment authorization. The employer must examine the employment eligibility and identity document(s) an employee presents to determine whether the document(s) reasonably appear to be genuine and to relate to the employee, and record the document information on the Form I-9. The list of acceptable documents can be found on the last page of the form. Employers must retain Form I-9 for a designated period and make it available for inspection by authorized government officers. NOTE: State agencies may use Form I-9. Also, some agricultural recruiters and referrers for a fee may be required to use Form I-9.

Edition Date :

March 8, 2013. Although employers should begin using the new form with the 3/08/13 date right away, older forms dated 02/02/09 and 08/07/09 will be accepted until May 7, 2013. After May 7, 2013, only the new form is acceptable. The revision date is in the lower left corner of the form.

Where to File :

Do not file Form I-9 with USCIS or U.S. Immigrations and Customs Enforcement (ICE). Employers must have a completed Form I-9 on file for each person on their payroll who is required to complete the form. Form I-9 must be retained and stored by the employer either for three years after the date of hire or for one year after employment is terminated, whichever is later. The form must be available for inspection by authorized U.S. Government officials from the Department of Homeland Security, Department of Labor, or Department of Justice.

Where to Find the New Form:

The new form is available at: www.uscis.gov/files/form/i-9.pdf. For further information, go to www.uscis.gov.

Contributed by Nancy Burt

SDA's Mission:

To promote the exchange of ideas and educate its members in the related disciplines of design firm administration.

Member Profile—Brigitte Roman

By Natalie Newman

For four years, Brigitte Roman has worked at Kishimoto Architects, Inc. as the Financial Officer, handling all accounting duties: accounts payable, accounts receivable, invoicing, payroll, and preparing financial reports for decision making. She works closely with the principals, project managers, and all other employees, striving for optimal results in all aspects of their operations. Founded in 1989, Kishimoto Architects, Inc. (KAI) provides architectural and engineering services to a variety of clientele in the public and private sectors. KAI possesses extensive experience in various project types: federal, municipal, religious, educational, county, utility commercial, and medical, to name a few.

Brigitte has been a member of SDA for just a little over a year and says, "My favorite thing about SDA is having a body of knowledge to turn to for questions I might have or referrals for office services, IT, health administrators, etc." Whenever possible, she likes to help other members when they need answers or comparisons on specific topics or industry trends that KAI may experience.

Brigitte says her top priority is spending quality time with her family. She says that learning from her elders and influencing the younger members of the family to be the best they can be comes in a close second. She loves most all music: pop, classic rock and reggae. Her favorite restaurant and meal are the prime rib and lobster at Captain Jack's in Sunset Beach. Brigitte's personal hobbies can be sorted into seasons. In the summer, she likes to go to the river and ride her wave runner and take the boat out. ("It's very invigorating when the wind is hitting your face.") In the spring it's all about camping. Beach camping at Big Sur is one of her favorites. In the winter, she likes going to the mountains, skiing, and sledding with the kids. Brigitte also loves to travel and has been to many destinations: East Coast, Mexican Riviera, Caribbean, and Hawaii, just to name a few, and she finds it unbelievable that she is still waiting to discover Europe.

When asked how she keeps her sanity when life is going crazy all around her, her answer was, "First and foremost, Prayer! Next would be working out: cardio then weights." She also wears royal blue when she wants to feel confident. Brigitte has Joyce Meyers and Joel Osteen teachings in her CD player which seems to start and end her day with strength, purpose and peace. And with that, she leaves us with this special thought to be the best you can be:

> Be someone who listens, and you will be heard. Be someone who cares, and you will be loved. Be someone who gives, and you will be blessed. Be someone who comforts, and you will know peace. Be someone who genuinely seeks to understand, and you will be wise. Be someone kind, someone considerate, and you will be admired. Be someone who values truth, and you will be respected. Be someone who takes action, and you will move life forward. Be someone who lifts others higher, and your life will be rich. Be someone filled with gratitude, and there will be no end to the things for which you'll be thankful. Be someone who lives with joy, with purpose, as your own light brightly shines. Be, in every moment, the special someone you are truly meant to be.

Free Lunch Seminar—Bring a Guest for Free!

Dear SDA Members and Friends:

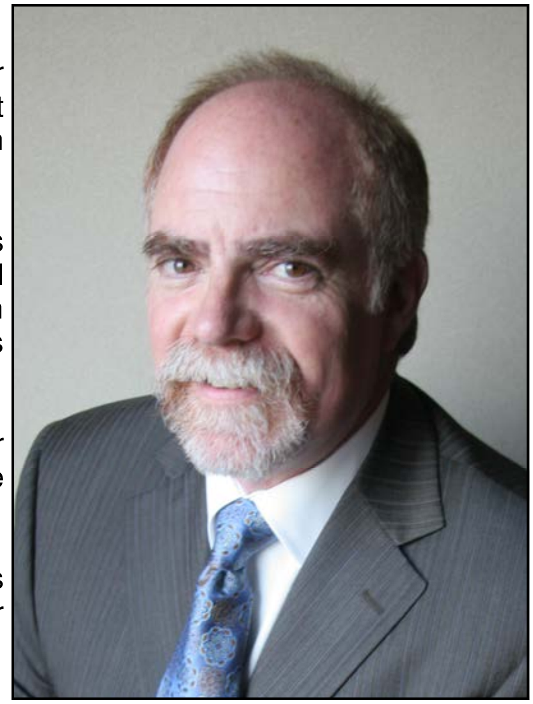
Our chapter is growing, but there's always room for more! We have created the attached for your use in inviting a colleague or guest to an SDA educational seminar. Please contact Marcy Fields, Corresponding Secretary, at marcyf@ccarchitects.com for an electronic version to forward or print.

If you're a vendor such as an insurance broker, reprographics vendor, personnel agency, etc. we know that you meet or communicate with a lot of people who could benefit from SDA. This is for you too! Keep a supply in your briefcase or at hand to email.

Be sure to RSVP for your guest when you bring him or her to a luncheon.

Member Profile—Tom Cannon

By Natalie Newman



Tom Cannon is one of our newest SDA members, joining our chapter in November of 2012. So far, his favorite thing about SDA is the lunch seminars. He has also been involved with Canstruction as part of a build team.

For the last few months, Tom has worked at JZMK Partners as their Business Manager, doing all financial and administrative duties. Since 1960, the firm has specialized in residential, resort, commercial, and educational design and is a design leader in the field of pre-fab and modular housing.

On a personal note, Tom has been married to our Chapter Treasurer, Helen Palermo, for seven years. He has three children: Denise (34), Sarah (33), and Taylor (31).

His favorite music is Blues, his favorite food is Italian, his favorite color is orange, and the most exciting place he's ever toured is Italy.

His interests lie in vintage house restoration and gardening with native plants.

Grammar Corner: Who's 'Dat?

Contributed by Betsy Nickless

Maybe it's just me, but I'm noticing more and more that "who" and "that" are being used interchangeably as a pronoun when referring to people, even in printed media.

For example:

> "The person *that* made the call..."
> "I loved her for the person *that* she was...."
> "The person *that* donated the money..."

In all those cases, it should be "The person **who…**"

The grammar rule about the use of "who vs. that" is pretty simple: **Who** refers to people; **that** refers to groups or things.

Examples:

1. Hillary is the one *who* called the meeting to order.
2. Bill is on the team *that* won first place.
3. She belongs to an organization *that* specializes in saving endangered species.

Monthly Seminar Recap

Roundtable Discussion
February 21, 2013

Lots of different topics were discussed at this roundtable:

- I-9 Forms: Use E-Verify (This is a requirement for Colorado employees).
- Where to advertise for open positions: Monster, Linked-In, AIA, colleges. Posting for one level of employee may result in obtaining resumes for other levels. Currently a big need for employees with five or more years of experience. Some salaries going up – some still have not raised salaries for five to six years.
- Watch for copy machine leases – Many have a 30-day cancellation clause or 10% increase in costs. Watch invoices for fuel surcharge even when they don't deliver anything to your business.
- Workers' Comp premiums for A/E firms: Even though you may have a low ex-mod, payrolls might have increased which will increase premiums.
- Auto insurance: Vehicles on the road are two years older than they were five years ago due to the sluggish economy.
- E&O insurance: Require your client to contract directly with subs. If you do have contracts with subs, make sure subs have insurance in place. Ask for certificates of insurance each year.
- Have wording in your contract with subs that they must keep insurance or you won't pay them.
- Employee reviews: tie pay increase to meeting goals that were established in prior review.
- One firm does Survey Monkey: "Rate your principal – Rate your benefits."
- "OneOC.org" organizes firm and employee philanthropic events (team building for a good cause).

Contributed by Nancy Burt

Monthly Seminar Re-Cap

Health Care Reform
Presented by Mike Rankin, Principal, e3 Financial
March 21, 2013

Mike explained the current situation with Health Care Reform and how firms will be impacted over the next 12 months.

- Currently 40 million people in the U.S. are uninsured - 4.6 million in California.
- There is no penalty for the small employer (2 - 49 employees) who does not offer insurance. Penalties only exist for firms with 50+ employees.
- Most of the same carriers we have now – Anthem, Aetna, Kaiser, etc. -- will continue to offer plans, but all plans will look the same with four different medical plan designs. The only way the carriers can effectively compete is with pricing that is the direct result of more "narrow" networks.
- Employers can purchase health insurance like they do now (in the general marketplace) or small employers can purchase insurance through the Exchanges.
- There will be a big outreach to the public with advertisements, radio and tv ads, etc., explaining the California Exchange and the requirement that all individuals must have health insurance as of January 1, 2014 or pay a penalty.
- August - September 2013, the Exchange will announce its new plans and new pricing.
- In October 2013, all employers will be required to inform employees about the Exchange - Details on this are yet to come.
- Waiting periods for new hires cannot be longer than 90 days (1st of the month following 90 days will be longer be permitted).
- Exchange will create one large risk pool for individuals and small businesses.
- Risk Adjustment Factors - RAF - (currently .90 to 1.10) will be eliminated. Since more groups are in the 1.10 RAF, this will significantly impact the firms currently at the lower (.90) rate level, giving firms currently in the 1.10 RAF some rate relief.
- Compression of age-band rates - instead of seven age band rates, there will be three.
- Creation of "metal" plans: Platinum, Gold, Silver, Bronze – depending on "richness" of the plan.
- In 2016, the 50- to 100-employee firms will be re-classified into the "small group" category.

Contributed by Nancy Burt

Succession Planning

Many of today's business failures are due to lack of thoughtful succession planning. As your company begins to think about the leadership transition process, the following key points will help you stay on track:

1. Select a person who has the personality and style to have a positive influence on the morale of the staff.
2. Choose a person with a great passion for the work, staff and clients.
3. Make certain that the person has a good working knowledge of the company and industry.
4. Seek a person with a high level of loyalty to the organization.
5. Select a person who understands the vision and culture of the firm and is committed to both.

Assess Current Circumstances

The first step is to assess your current circumstances. If major changes need to be made, it is probably better to do so before any succession takes place.

Define Leadership Roles & Responsibilities

Spend time determining what kind of leadership your company needs. Write down the specific responsibilities the person will have.

Confirm Leadership Skills Needed

Confirm what leadership skills the person must embrace. Some basic leadership skills are assumed, but others may relate to your industry or firm. Always consider personal attributes and people skills.

Review Candidates

Now that you have skills and responsibilities in place, it is time to review internal and external candidates.

Set Schedule & Timeframe

The timing of your succession plan depends on your firm's decision–making requirements. The longer time you need to make decisions, the longer you will need to work through the process. Most firms need 12 to 18 months.

Determine Costs

There may be little to no costs associated with your plan, but many firms have incurred costs with travel, search, training, outside consultants, personality evaluations, life insurance, non-compete agreements, etc.

Make Commitment

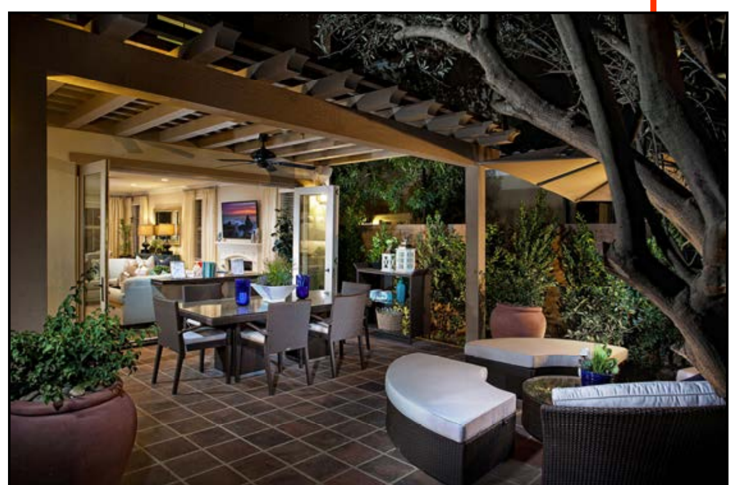
Carry out your plan. Don't hesitate to modify the plan as you go.

Source: SDA National WebSite. For the complete report, visit www.sdadmin.org or www.laporte-insurance.com.

Recently Completed Projects

Chamber of Commerce Building
Westminster, Calif.

Architect: Dougherty + Dougherty Architects, LLP
SDA Member: Helen Palermo



Garden Hill at Portola Springs
Irvine, Calif.

Builder: KB Homes
Landscape Architect: ValleyCrest Design Group
SDA Member: Cheryl Mathes

Hull Middle School
Torrance, Calif.

Architect: IBI Group
SDA Member: Dee Dee Jackson

Society for Design Administration

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The Commentary

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