

THE COMMENTARY

Spring 2018 Edition

A Newsletter of the Orange County Chapter, Society for Design Administration

President's Corner

By Dee Dee Jackson, President



Welcome to the Orange County Chapter! I am humbled and pleased to be the 2018 Chapter President and I look forward to working with all of the members to achieve our SDA OC Chapter goals.

After a very sad start to our year, losing our dear friend Judy Mitchell, Past President, Friend, Role Model, Mentor and all around great person. We were able to pick ourselves up and conduct our first business meeting knowing full well that Judy wouldn't want it any other way. She believed in the SDA organization and was passionate about making our Chapter the best it can be. We miss her dearly.

We confirmed our monthly Board meeting dates and invite you to attend. We also scheduled our monthly educational seminars and discussed some unique activities such as wine tasting, paint nights and design tours. A wine tasting event has been scheduled for August 16 to celebrate the 35th anniversary of our Chapter. We will celebrate our current, past and future members! Please look for details on our website, Facebook and future newsletters for chapter events, meetings and information.

I would like to thank the Board members and Directors for their continued support and encouragement. Anna, Betsy, Paul, Cheryl, Penny, Natalie, Connie, Karen, Nancy and Wendy, you are my rocks!

I would also like to thank our Sponsors for their continued support:

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Let's make this a great year!

Dee Dee Jackson, SDA/OC President

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- EDSymposium18, Reminders (page 9)

SDA Orange County

Mission Statement:

The Society for Design Administration advances management and administrative professionals in the A/E/C industry through education, networking, and resources. Our vision is to have an SDA member in every A/E/C firm.

**President
Dee Dee Jackson**



Dee Dee Jackson has been the Executive Assistant to one of the founding partners and Office Manager for a global architecture, planning, engineering, and technology firm for over 30 years. IBI specializes in urban design and planning, building and landscape architecture, advanced transportation management and traffic systems, real estate analysis, communications specializations, and software development. During this time, she has developed and maintained policies and procedures for the Accounting, Human Resource and Marketing departments. She continues to manage the overall day-to-day operations.

Dee Dee has been a member of the SDA - Orange County Chapter intermittently over the last 29 years. She believes the training, mentoring, and camaraderie of belonging to such an organization is a great asset.

When not at work, she enjoys travelling, hiking and riding her scooter.

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**Vice President:
Anna Kordik**



Anna Kordik has been in the A/E/C industry for over 22 years. She has held many positions during her career, such as receptionist, bookkeeper, administrative assistant, project administrator and office manager. She has handled daily office procedures, coordinated travel and office events. She has supported Project Management teams with proposals, RFIs, submittals, specifications, and spreadsheets. She has worked with AR and AP accounts, office payroll, and Certified Payroll. In addition, she has supported HR Departments with office protocol and procedures.

Anna has been a member of the SDA - Orange County since 2014 and has been a board member since 2016. As an advocate of education, Anna views SDA as a wealth of knowledge, covering all facets of professional administration in the A/E/C industry. She values the education and personal relationships she has gained through her membership with SDA.

Anna enjoys going to Disneyland,
reading, cooking and baking.

Treasurer:
Cheryl Champagne,
CDEA



Cheryl Champagne has worked in the A&E industry for over 25 years. She recently took the position of Controller for tk1s.

Over the years the SDA has been an integral part in her professional career. The programs offered by the SDA give her the opportunity to meet other administrative design professionals, learn and keep updated with current trends, as well as network within the building industry. She has attended National and Regional conventions, as well as participated on the local Board, monthly seminars, and committees.

Cheryl enjoys participating in the community outreach programs, such as Project Playhouse and CanstructionOC. Cheryl is a proud supporter of the SDA and enjoys participating in all that the SDA has to offer.



Meet the 2018 SDA Orange County Board

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Recording Secretary: Paul Blanchard



Paul Blanchard has been the Chief Financial Officer of PJHM Architects, Inc. since 2007 and has been with the

firm since 1996. PJHM Architects has been providing architectural services for school districts and civic clients throughout California since 1963. Paul manages the financial, human resources, technology, insurance and contracts for PJHM. He graduated from California State University San Marcos in 2002 with a BS in Computer Science.

Since joining in 2015 the SDA has become a important resource for knowledge and mentorship for him. He believes brainstorming with others in the industry with similar responsibilities and experience can provide valuable insight and lend confidence to critical business decisions.

Paul has been married to his wife Michele since 2005 and they have two elementary school age boys. Paul enjoys volunteering for leadership positions for his boys' activities, maintaining the house and his classic Volkswagen bus.

Corresponding Secretary: Betsy Nickless, CDFA



Betsy Nickless was a co-founder of the Orange County Chapter and has filled all chapter board positions. She was the recipient of SDA's National Lifetime Achievement

Award, the highest honor bestowed by SDA.

She is the Business Manager at Mark Scheurer Architect, where she oversees all administrative functions of the company including finance, HR, contracts, and administration of the mid-sized firm that specializes in award-winning residential communities worldwide.

She served on the national Executive Committee as Treasurer, President-Elect, President, and Past President from 2011-2015. She currently chairs the national Bylaws Committee. She has also been a member of Construction Orange County's executive board since its inception in 2007 and looks forward to chairing the 11th Annual Construction competition this year. Construction has provided nearly \$200,000 and over 500,000 pounds of food to the Orange County Food Bank since its inception.

Betsy and her husband of 36 years, Steve, enjoy trying new local restaurants, and her favorite music is contemporary Christian. She met Steve at the car races on the east coast, where she was in charge of timing and scoring, and he was doing PR work for one of the teams. They have two grown children who are both married.

Chapter Business Meeting Schedule

April 5, 2018, 5:30 p.m.

Location: Mark Scheurer Architect
RSVP to Betsy Nickless at BetsyN@MSA-Arch.com

May 3, 2018, 5:30 p.m.

Location: pjhm architects
RSVP to Paul Blanchard at Paul@pjhm.com

June 7, 2018, 5:30 p.m.

Location: LTSP, Inc.
RSVP to Anna Kordik at Anna.kordik10@gmail.com

July 12, 2018, 5:30 p.m.

Location: pjhm architects
RSVP to Paul Blanchard at Paul@pjhm.com

August 2, 2018, 5:30 p.m.

Location: Douglas Pancake Architects
RSVP to Penny Nelson at PennyN@pancakearchitects.com

September 6, 2018, 5:30 p.m.

Location: IBI Group
RSVP to Dee Dee Jackson at DJackson@IBIGroup.com

October 4, 2018, 5:30 p.m.

Location: TBD
RSVP to Natalie Newman at NatalieNewman@yahoo.com

November 1, 2018, 5:30 p.m.

Location: Douglas Pancake Architects
RSVP to Penny Nelson at PennyN@pancakearchitects.com

No Chapter Business Meeting in December 2018

A Tribute to Judy Mitchell

By Penny Nelson, CDFA, Director

On July 23rd of 2013, our SDA chapter held a happy hour/mixer at El Torito Grill in Irvine. As we were gathering, a young lady approached us and asked if we were the SDA group. That young lady was Judy Mitchell. Her warmth, professionalism and sunny personality drew me to her immediately, and all attending felt an immediate connection with this bubbly and outgoing young lady. Judy joined SDA, began attending our monthly seminars, immediately offered her assistance, and jumped in to help whenever needed. When the board had a vacancy for 2014, Judy's name was immediately raised, and she was asked to consider the position of co-vice president.

In 2016, Judy became vice president, and when the president position became vacant mid-year, Judy again stepped up. Never one to shirk from a challenge, Judy jumped right into the president role with her usual gusto and optimism, and guided the chapter for the remainder of the year. That year, we held our first A/E/C Industry Networking and Recognition Mixer at Gensler, with Judy managing many of the details it took to organize this successful event.

In the beginning of 2017, Judy took on the official, full-year president role. Building on her half-year of experience, Judy went on to lead the chapter in a successful year. Under Judy's leadership, the chapter held numerous seminars, helped expand the number of members, held a networking mixer, a wine-tasting membership drive/networking mixer, and submitted an entry for the national Chapter Excellence Award. Judy attended EDSymposium17, where she befriended and charmed many SDA members from across the United States and Canada with her friendly greetings and wonderful smile.

Judy was prepared to repeat her successful year and take on the president role once again in 2018, but illness prevented her from doing so. Many of us remained in contact with Judy during her illness, texting and sending Facebook messages, encouraging her as she encouraged us. However, last month Judy lost her fight to her illness, and we lost her. As word spread through our SDA board, we all shared a feeling of bewilderment that such a vibrant person could leave us so soon. We gathered together the morning after the news to share our memories, tears, laughs, and hugs, knowing that this was exactly what Judy would have wanted us to do. Her absence was strange to us, with the unreality of it still haunting our hearts. I hope you'll all remember Judy as fondly as I do, and approach life as Judy did: with gusto, optimism, humor and always, always a smile!



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A Tribute to Judy Mitchell

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Lunch Seminars

January Lunch Seminar: 2018 Tax Updates - Credits & Incentives

Speakers: Steve Ho and Jeff Johnson, Welsh Advisors

By Natalie Newman, Director

SDA/OC would like to thank Steve Ho with Welsh Advisors (right), who gave a very informative and interactive seminar on Tax Incentives and Tax Updates for 2018. Pictured here with Jeff Johnson, Managing Director and SDA member (left).

Great takeaway: you just learned how to save your company at least \$25,000 in taxes this year!

Steve Ho is a tax attorney and has managed research credit studies for many Fortune 500 companies in various industries, representing hundreds of millions of dollars in tax credits and refunds. His primary expertise is helping clients claim and defend the federal and state research tax credit. As a former Big 4 Senior Manager and Fortune 500 Senior Tax Manager, Steve has over eighteen years' experience conducting research tax credits, including documenting and claiming the credit, defending the claimed credit under audit, and reviewing the claimed credit as part of the FIN 48 process. Steve has built a methodology to capture qualified costs by projects for business with thousands of projects. Additionally, he has extensive experience with the IRS and state audits, appeals and settlement processes, with an audit acceptance rate of 98.5%. Steve also has in-depth experience, knowledge, and success handling large pre-filing agreements.



February Lunch Seminar: Employment Law Update 2018 - The Expanding Reach of Workplace Regulations

Speaker: Erick J. Becker, Cummins & White, LLP

By Anna Kordik, Vice President

With every new year, come new laws and regulations. It is important to make sure you and your company are kept up to date for 2018. In this month's seminar, Erick J. Becker with Cummins & White, LLP gave an informative presentation on the expanding reach of workplace regulations. Members in attendance were able to learn about the following key laws and regulations, which affect today's workplace:

- California's new Parental Leave Act (PLA)
- The exclusion of salary history for applicants
- Legal issues in hiring regarding criminal convictions ("Ban the Box")
- Marijuana legalization
- Immigrant protections regarding ICE workplace visits
- New requirements for sexual harassment and discrimination training
- Retaliation claims
- California court decisions

SDA/OC would like to thank Erick J. Becker for the wonderful presentation.

Erick J. Becker leads the labor and employment practice group at Cummins & White, LLP. With more than 20 years of practical experience in labor and employee relations, his expertise centers on helping employers maintain compliance with the myriad laws and regulations governing employment.

Mr. Becker also represents employers in all areas of employment litigation. He has extensive experience handling matters before the NLRB, EEOC, State Labor Commissioner, and other administrative agencies. He works with clients in a wide variety of industries, including construction, manufacturing, transportation, and health care.



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Lunch Seminars

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March Lunch Seminar: Roundtable

Speaker: All Members

By Anna Kordik, Vice President

Twice a year, our chapter holds a Roundtable, which gives our members and non-members the opportunity to network and connect with one another. This is the perfect forum to ask each other questions and to assist one another with answers and solutions.

After announcements were made, Betsy Nickless presented a review of the SDA National website, as there were many changes. She directed members to where they can find and update their profile, look-up events, discover forums for different subjects of interest, and find resources they would be able to use. She also reviewed the website for non-members as well.

Starting conversations may be difficult for some people, so Chapter President Dee Dee Jackson started the fun with an ice breaker "Two Truths and a Lie." On a piece of paper, attendees wrote down two truths and one lie about themselves. When it was your turn, you would read it out loud. Then the other attendees would have to guess, which one is the lie. Not only is this a fun way to start a group conversation, it also gives the opportunity to get to know one another.

The conversation moved onto AIA B101 contracts. Although, this type of contract is not used very often, clients will sometimes request it. The best practice for this contract, as with all contracts, is to always review it for liability and other language that may have to be changed to suit your company's needs. Other topics discussed were offshore production work, document retention, computer workstation backup, and SB496.

During the roundtable, attendees were able to take a free professional headshot for their use.

There were many attendees present, and it was a successful roundtable. The next one is scheduled for Thursday, November 15, 2018.

SDA/OC would like to thank Betsy Nickless for her SDA National website presentation and Laura Nelson for her time and professional photography.



Upcoming Lunch Seminars

April 26, 2018:	<i>Leadership Skills Development</i> - Mike Shepherd, CRESTCOM Leadership Development
May 24, 2018:	EDSymposium18 Recap
July 19, 2018:	TBD
Oct. 18, 2018:	TBD
Nov. 15, 2018:	Roundtable/Annual Business Meeting

**All lunch seminars are held from 11:30 a.m. - 1:00 p.m.
at the Lutron Design Center
2458 Dupont Drive
Irvine, CA 92612**

Evening Seminar

September 27, 2018
HR for Architects
Speakers: Mike Murtaugh and
Helen Fabian, Murtaugh Treglia Stern
& Deily LLP

**Registration is at 3:30 p.m.
Seminar is from 4:00 p.m. to 6:00 p.m.
at Murtaugh Treglia Stern & Deily LLP
2603 Main Street
Penthouse
Irvine, CA 92614**

Recent Events

SDA Orange County Annual Holiday Potluck and 2018 Officer Installation

By Anna Kordik, Vice President

To celebrate the year end and anticipate the upcoming new year, SDA Orange County holds an Annual Holiday Potluck and Officer Installation. Last year's celebration was held on Sunday, December 10, 2017 at Cal and Wendy Woolsey's home. All members and guests were welcome to celebrate and bring a delicious brunch dish to share with everyone. There were tasty casseroles, baked goods, salads and desserts, in addition to the Honey Baked ham that our chapter provided. Various drinks, including mimosas, were provided by Wendy and Cal for the enjoyment of all.

In keeping with tradition, the 2018 officers were installed and the 2017 Member of the Year was announced. I was extremely surprised as I received this prestigious award and promised to do my best for 2018.

To add to the merriment, there was an ornament exchange. Attendees who brought a wrapped ornament picked a number and would be called in that order. When the participant's number was called, he or she was able to choose either a new wrapped ornament to open or an already opened ornament from someone else. The competition brought much laughter and enjoyment.

This event has been an SDA/OC tradition for almost 35 years, and is always a wonderful way to socialize with other members and their significant others in the closing year.

I hope to see everyone at this year's Annual Holiday Potluck and Officer Installation in December.

A special thanks to Cal and Wendy Woolsey for their hospitality.

List of 2018 Events

May 17-19, 2018

EDSymposium18
in Salt Lake City, Utah

Jun. 21, 2018, 5:30-9 p.m.

SDA Painting Social
At Brushstrokes in Old Town Tustin

Aug. 16, 2018, 5:30-7:30 p.m.

SDA OC 35th Anniversary, Membership Drive,
Networking Social & Wine Tasting
At Orange Coast Winery in Newport Beach

Dec. 9, 2018, 10 a.m.-1 p.m.

Holiday Potluck & Installation of Officers
At the home of Cheryl and Mike Champagne



Reminders



Attending the SDA National Convention, EDSymposium, is one of the best things you can do for the future of your business and your professional and personal growth. The conference is designed to give you a wealth of usable content in each of SDA's core professional education areas: Finance, Office Administration, Human Resource, Marketing, and Project Management. Each session will be sure to keep you up-to-date with the latest changes that are occurring within the industry—which we all know happens on almost a daily basis now-a-days.

Some Additional Reasons for attending EDS18:

- Network with other individuals within your field from across the U.S. and Canada.
- Share your ideas and get immediate feedback.
- Learn the latest technologies that can grow your firm and save money.
- Explore the host city and see new sights.

EDS18 is scheduled for May 17-19, 2018 in Salt Lake City, Utah.

Watch for our Chapter's EDSymposium18 Scholarship Announcement to be released soon!

CERTIFIED DESIGN FIRM ADMINISTRATOR (CDFA) CERTIFICATION



Are you ready for an opportunity to advance your knowledge in the A/E/C industry? If so, then sign up for the CDFA program.

This SDA voluntary program lets your employers know that you are committed to excellence and advancing your career.

The accreditation will boost and challenge your knowledge in: Office Administration, Technology, Finance, Human Resource, Marketing and Project Management.

For more information on the program, eligibility and study groups, please visit our SDA OC website.

Excellence in
Design Firm Management **SDA**
Orange County

Orange County Member Anniversaries This Quarter:

Megan Ajamian - 2 Years
Marcy Fields - 16 Years
Jacqueline Malagon - 2 Years
Debra Vaught - 2 Years
Wendy Woolsey - 21 Years

Happy Anniversary!

Thank you for your years of
dedication and service.

We appreciate your
continued support.

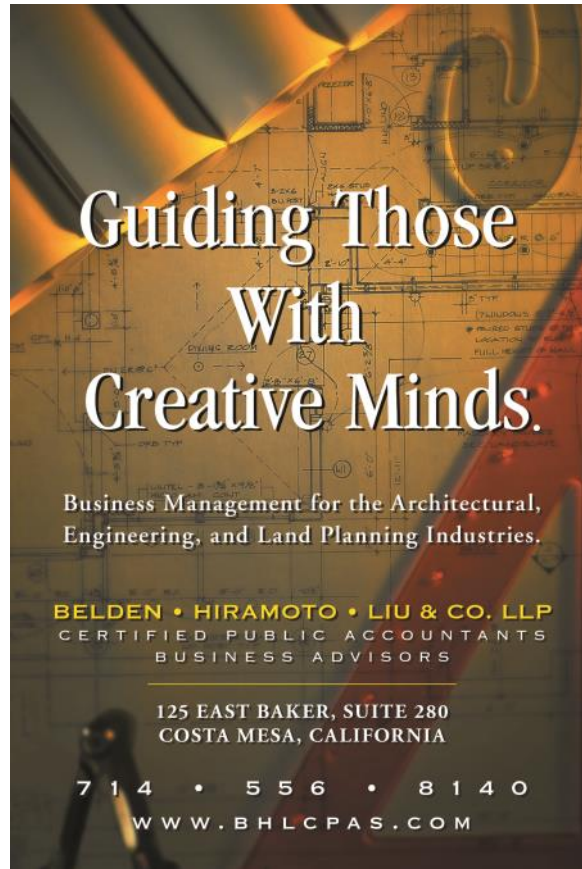
JOB BOARD

Did you know that SDA maintains a job board? Our board includes current job listings in the A/E industry, as well as qualified personnel looking for a position. As the AIA maintains its own job board for licensed architectural staff, our board includes administrative positions.

If your firm is looking for a person with certain qualifications, or if you know of someone who is looking for a position in an A/E firm, please contact Betsy Nickless by email at betsyn@msa-arch.com

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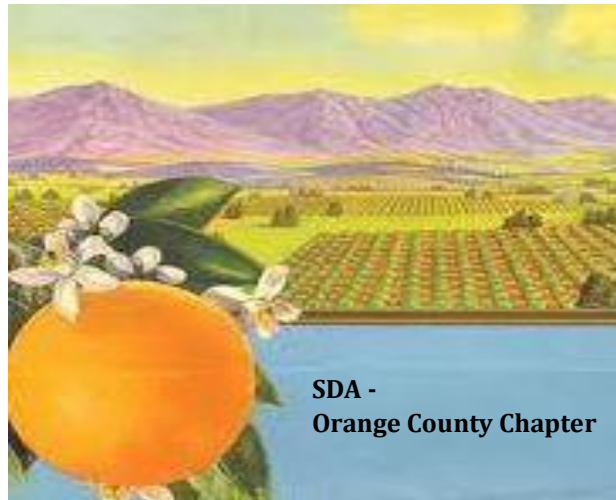


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For information regarding sponsorship, please visit our website at www.sdaoc.org or contact Cheryl Champagne at CChampagne@tk1sc.com.



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THE COMMENTARY

Published quarterly by the
Society for Design Administration
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www.sdaoc.org

Do you have a great idea for an article and would like to see it featured in our next newsletter?
If so, contact Anna Kordik at anna.kordik10@gmail.com