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THE COMMENTARY

Summer 2012 Edition

A Newsletter of the Society For Design Administration
Orange County Chapter

President's Corner

By Nancy Burt, SDA, President

In May, I traveled to Portland, Oregon for the EDSymposium12, SDA's annual convention. It was four days filled with networking, educational seminars, sightseeing, and fun, and I came away with a renewed sense of purpose for the work we do and the impact we have in our firms.

Those attending a seminar on *Bringing Your Presentations to Life* were told (and practiced!) how to be Big and Bold and to take off our masks to help our listener get the message. During the *Project Delivery Problems-Techniques for Minimizing Their Impact* seminar, attendees were given techniques for scheduling, training, and assessing the risks inherent to all projects. In a *Back to Basics* presentation, we were tested and instructed on grammar and punctuation skills, and in *How To Tune-Up Your Team To Do Anything* we were given tips on leadership and management skills such as using benchmarks, recognizing success, and showing appreciation.

This was just a small sampling of the over twenty hours of education that was available to us, and all of it had something useful that attendees could bring back to their firms and start implementing immediately. In fact, many of us wished our principals, owners, and co-workers were there to hear and be part of the seminars.

Next year's EDSymposium13 will be held in Williamsburg, Virginia, from May 15-18, 2013 and I encourage you to start planning now to attend. You will not be disappointed!

I would like to share a few other highlights from the week:

- Currently there are 25 chapters across the US and Canada ranging in size from 3 to 55 members. The current national membership is at 449 members, and our OC chapter membership is at 31, so we are one of the largest.

(Continued on Page 3)

Upcoming Events

Summer 2012

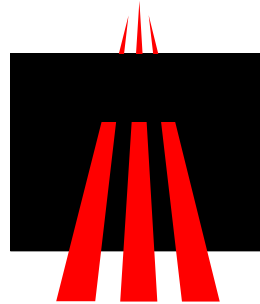
- August 7** **Tour and Cooking Demo 5:30 pm**
Sub-Zero and Wolf Showroom
Costa Mesa
- August 16** **Luncheon Meeting 11:30 am**
"Tales from the O. C. Archives:
Google Architecture" presented by
local historian, Chris Jepsen.
Lutron Event Center, Irvine
- Sept. 1—23** **Canstruction 2012**
Entries will be displayed at
South Coast Plaza
- Sept. 1—30** **Project Playhouse 2012**
Entries will be displayed in Playhouse
Village at South Coast Plaza
- Sept. 6** **Business Meeting 5:30 pm**
Meeting will be held at Irwin
Partners Architects
- Sept. 16** **Canstruction Gala 5—7:30 pm**
SOCO, Costa Mesa
- Sept. 20** **Luncheon Meeting 11:30 am**
Hal Block will enlighten us on
everything we need to know about
"Liens, including some recent changes
to lien laws and forms."
Lutron Event Center, Irvine
- Sept. 30** **Project Playhouse Volunteer Day**
11:30—4:30
Playhouse Village, South Coast Plaza
Costa Mesa

Looking Ahead

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

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.



SDA's Mission:

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



July 2
July 2

Alicia Igram
Penny Nelson

September 2
September 29

Aimee Mandala
Nancy Burt

President's Corner

(Continued)

- The number-one goal of our Society this year is to increase membership. It is the Mission Statement of SDA to *"have a member in every A/E/C firm."*
- Regarding Canstruction – since June 2011, 117 cities have held competitions and Canstruction will have a presence at the Summer Olympics coming up in London. Orange County's entry from FIDM (the pink purse) won the first International People's Choice Award, which was voted on through Facebook.
- Our Chapter won a Gold-level Chapter Foundation Award, which was based on a point system and recognized our annual achievements. Six other Chapters also received this award.
- Natalie Newman applied for and was awarded a \$1,000 grant from the National Past Presidents' Council to attend EdSymposium12.
- Betsy Nickless was awarded the Star Award from our Chapter, recognizing her service and dedication; she was also awarded the Forum Award for Finance. She gave her nomination speech during the annual meeting and then was voted in as our National President-Elect.

Of course it was not all business during the week, and some of us had time to tour the waterfalls, see the city from the 30th floor of a downtown building, visit the old armory turned community theater, have a donut or two at VooDoo Donuts, ride the light rail, and eat at the number-one Irish restaurant and pub in all of America.

I want to thank you for your continued support of SDA and look forward to seeing you at your next event.

Volunteers Needed

The Canstruction Awards Gala on September 16 is an evening event where the 20 build teams will receive recognition and the judged awards for their structures. The 2012 Gala comes with some changes. Its location is new. The event will be held at South Coast Collection (SOCo) in the courtyard area next to the OC Mart Mix. SOCo is a progressive, urban shopping center of trendsetting home furnishings and other specialty retailers in Costa Mesa at Hyland and Sunflower Avenues. The other change is earlier start and finish times—5:00 to 7:30 PM.

The tasks for the volunteers are general set up starting at 4 PM, staffing the check-in and name badge tables, selling raffle tickets, and monitoring the silent auction sales table.

If you are interested in being a Canstruction Awards Gala volunteer and part of a fun and worthwhile evening, please contact Karen Henderson at khenderson@griffinholdings.net or 949-497-9000 x 265.

Be a Leader

1. Begin with praise and honest appreciation.
2. Call attention to people's mistakes indirectly.
3. Talk about your own mistake before criticizing the other person.
4. Ask questions instead of giving direct orders.
5. Let the other person save face.
6. Praise the slightest improvement and praise every improvement.
7. Give the other person a fine reputation to live up to.
8. Use encouragement. Make the fault seem easy to correct.
9. Make the other person happy about doing the thing you suggest.

From *How to Win Friends and Influence People* by Dale Carnegie. Contributed by Nancy Burt, SDA.

New 401(k) Plan Disclosure Rules

By Michael S. Rankin, e3Financial

As you have probably heard by now, important new 401(k) disclosure rules are in place beginning July 1, 2012. With 401(k) plans rising in popularity, plan participants have become increasingly responsible for making their own retirement savings decisions.

The Department of Labor (DOL) has become concerned that participants in self-directed 401(k) plans might not have access to, or might not be considering, information critical to making informed decisions about the management of their accounts--particularly information on investment choices, fees, and expenses.

There are two main components of the legislation:

Regulation governing **Plan Sponsors 404a-5** (the employer).

Regulation governing **Service Providers** (brokers, advisors and plan vendors).

Let's take the first set of regulations covering you, the Plan Sponsor:

The new regulations require self-directed 401(k) plans ***to provide detailed information to participants about the plan and its investments***, on a regular and periodic basis, so that participants can make informed investment decisions. Quarterly statements will now need to include this information (fees, expenses, returns, etc.). Further, there is an annual statement required which also discloses this information.

For most plans, the initial annual disclosure must be furnished no later than **August 30, 2012**. The first quarterly statement must be furnished no later than **November 14, 2012** (for July through September).

The good news for most plan sponsors is that your vendor (e.g. Fidelity, John Hancock, etc.) will most likely be producing these statements on your behalf. However, you have a responsibility to ensure that these statements are going out on a timely basis from your provider. Furthermore, you should familiarize yourself with the reports, as you may get questions from your participants.

Let's look at the regulation governing your Service Providers - 408(b)(2):

It requires that all service providers disclose their fees and services to clients and prospective clients. You should receive these notices by July 1st from your providers.

If you have any questions, feel free to contact our office at 949-724-1964 or visit our website at www.e3financial.com.

Member Profile—Marcy Fields

Interview and Article by Natalie Newman, SDA

For twenty years, Marcy Fields has been employed with Carlile Coatsworth Architects (CCA) as the Office Administrator, where she oversees all the functions of the office including handling HR, payroll and financials.

The two owners of the firm met at Cal Poly San Luis Obispo and started their business in 1989 – there was a third owner who left in 1997 to move back to his home state of Kansas. An interesting tidbit- the two current owners' wives have known each other since second grade and Marcy actually went to high school with them, where they were all cheerleaders together.



Back in 2008, CCA had close to 40 employees; as things started slowing down, they shrank down to 10 employees and are now (happily) back up to 26 employees. CCA has a diverse background with office, commercial, retail, industrial, warehouse and residential project experience. Current clients include The Irvine Company, JoS A Banks, Saks Fifth Avenue, Simon Properties, Disneyland Resort, United Brotherhood of Carpenters, as well as some developers. Some more notable local projects include Newport Lexus, Javier's Crystal Cove, Mother's Markets, Whole Foods, and Pain du Monde in Fashion Island, The Bluffs, Oak Creek Golf Course and Shady Canyon Recreation Center. Beyond all that, in addition to being creative and savvy businessmen, the two owners are nice guys that Marcy has very much enjoyed working with for the past 20 years.

Marcy has been an SDA member for 10 years and even though she doesn't feel like she's contributed to the Chapter much, she does attend the monthly seminars, and occasionally refers to the Forum, which she thinks is a great resource for its members. Marcy's favorite thing about SDA is learning about how other firms operate and getting feedback from so many knowledgeable sources. Whenever a question or issue arises, she appreciates how extremely eager other members are to help when asked.

On the personal side, Marcy has been happily married for 21 years to Doug Fields, a construction estimator for Troyer Contracting in Santa Fe Springs. They have a 19-year-old daughter named Spencer Margaret, who is going into her second year at Emerson College in Boston.

Marcy likes music, mostly rock n' roll, Rolling Stones in particular, but enjoys some newer music like the Black Keys. She takes her music with her everywhere she goes and has reggae, disco and rock on her iPod. Her hobbies and interests include hiking and spending time at the beach, but what is taking up so much of her time these days is her new Golden Retriever puppy named Maggie Mae and reading the *Puppy Whisperer* so she can learn to use gentle, compassionate training methods on the new member of the family. Her favorite food is Mexican, and her favorite restaurant is the Rooftop in Laguna, where just being there is the treat for her.

Marcy also enjoys traveling and loves the island of Kauai, getaways to Big Sur, and vacationing at Jost Van Dyke (the barefoot island) in the British Virgin Islands.

When asked if there were any other interesting tidbits worthy of print that she'd like to share, Marcy said "My 15 minutes of fame, was when I worked as a secretary for John Wayne, in his home on Bayside Drive in Newport Bay, right before he died".

Monthly Seminar Highlights

April 2012: Meals and Rest Periods—After The Brinker Decision

Presented by Erick Becker, American Consulting Group

Notes Contributed by Nancy Burt, SDA

April 12, 2012, was like “Christmas morning” for employers: In a unanimous decision, the California Supreme Court ruled that employers are not responsible for ensuring employees take a meal period. Employers do not have to “force” employees to take their lunch. The burden is now shifted back to the employee.

Employer meets the obligation to provide a meal period if:

- Employee is given the opportunity to take a 30-minute un-interrupted break.
- Employer relinquishes control over the employee for the entire 30 minutes.
- Employer does not impede or discourage employee from taking the break.

Employer may still be liable if:

- Employee is forced to work for any portion of the 30 minutes.
- Employee is not free to leave the workstation.
- Employer discourages taking of the break.

Meal period must be taken before or at end of five-hour mark;
Second meal period is owed only if employee works ten hours;
Rest periods do not have to be taken before the meal period.

The court says class action claims can still be pursued if there are common policies or practices by the employer to deny meal periods.

Potential issues for employers:

- If employee chooses to work through lunch period (which he can now do), this may create an overtime issue.
- Employees taking meal periods at a work station or desk can claim they were still controlled by the employer during that time period.

Best practices for employers:

- Maintain clear policies in handbook regarding availability of rest periods and meal periods
- Revise policies
 - Overtime – can’t do it unless you have prior approval
 - Taking the meal period in their work area – “if you choose to take a meal period at a work area, you will not perform any work...”
- Train managers and supervisors on do’s and don’ts related to administration of break policies
- Require employee to complete a form if they voluntarily work through the meal period
- Having employee just record eight (8) hours for each day does not show any record of meal periods – have some sort of acknowledgement on time records that employee was given the opportunity to take meal and rest periods

Monthly Seminar Highlights (Continued)

June 2012: Cloud Computing Presented by David Scott, President, CMIT Solutions Notes Contributed by Nancy Burt, SDA

Most succinct definition: *Utilizing networked computer resources to accomplish your business goals.*

Why cloud computing:

- Secure and available
- Greater collaboration
- Access it anywhere and at anytime
- Levels of efficiency:
 - Pay for what you have
 - Pay for what you need
 - Pay for what you use
- Handles the peaks and valleys of business/economics
- Applications /updates

These are examples of cloud based:

Facebook, DropBox, Gmail, MS Exchange, Quickbooks

If you are a 15- to 17-person firm, the cloud is probably more economical for you than MS Exchange.

All reputable cloud companies are backing up somewhere else in case of failure. Go with larger, reputable companies; some are not as reliable and dependable.

What defines the cloud:

- Software as service – you don't buy the software and load it, you pay a monthly fee
- Infrastructure as a service – Amazon, Rackspace
- Platform as a service

Private cloud could be an option: operated solely for an organization, managed by the organization or a third party and may exist on or off premises

Security: Ask if the data is encrypted. Mozy, Carbonite, and Rackspace are good choices – might be HIPAA certified and SAS70 compliant.

Revit and 3D modeling might not be a good option for the cloud.

EDSymposium 2012



“Orange” you glad you’re at the SDA Convention?

(From left: Nancy Burt, Wendy Woolsey, Penny Nelson, Betsy Nickless, Natalie Newman, Connie McKenna, and Dee Dee Jackson)

Betsy accepting an award for FIDM for Construction. This was the result of the first International People’s Choice Competition, and FIDM’s structure, “Bagging Hunger,” won.



**Betsy, Natalie, Wendy and Nancy
(Out on the Town)**

Natalie and Nancy



EDSymposium 2012



Natalie, Nancy and Penny

Dee Dee and Wendy



We are the girls of the chorus . . .

EDSymposium 2012: It's Not All About What You Take Home With You . . . It's About Implementing Everything You Learned After You Get Back in the Office!

By Natalie Newman, SDA

To start this article, I'd like to thank the Past Presidents' Council (PPC) for awarding me with the PPC Grant to attend this year's SDA National Convention. I understand that the PPC provides leadership to those in need, mentors new ExCom members and new chapter presidents, helps struggling chapters, and I am grateful that they provide this PPC Grant for members like me to attend EdSymposium to further our education.

I'd also like to thank all the members of the Portland Chapter, especially Leslie, Collette and Glumac for a fun Host Chapter Party held in their new LEED Platinum-designed office space where we enjoyed a 360° view of the city! It was a great way to kick off the week.

In addition, I'd like to thank the convention coordinator, Tami Griffin, for a great experience with a great balance of education, networking, local activities, and fun.

Now the reasons why I wished to attend EDS12 and applied for the PPC Grant are all the obvious ones... see old friends and make new ones, attend beneficial seminars and receive a diverse range of knowledge from attending them, converse with presenters and exhibitors and see what useful products are out there, and experience the culture of Portland. But mainly, it's the "take-aways" -- the information you take back home with you and that you implement into your office or share with your chapter. And this year I've brought back some really good information.

When attending the *"If You're So Good, How Come You're Not Rich?"* seminar presented by Steven Burns, I learned that the real value of a company lies not in the financials, but in the best-practice areas that are responsible for building long-term value and success. Steve touched on '10 Keys of Success,' and I e-mailed a summary of this seminar to the principal, project manager and senior engineers in my firm to introduce them to ways to strengthen the foundation of our firm. A FUN FACT... under the second Key of Success during this seminar, Communication, I learned about HipChat. HipChat is a private instant messaging network for companies, teams, and organizations. Features include: chat rooms, file sharing, and searchable chat history. For more information, you can follow them on twitter @HIPCHAT or watch a quick intro on YouTube.

The *"Living in the Real World: Contracts, Contractors, & Collapses"* seminar by David Ericksen, led us through a real-life case study that provided tough lessons in contract management and construction phase discipline and documentation. The end result was one death, two injured workers and combined claims exceeding \$10 million. Noteworthy Tips to share in your office too: During safety walks or final job-walks, retain all records. Don't throw away 'scratch notes' that show the contractors' deviations during the onsite walk-through. Never recommend a solution if it's outside of your scope. Immediately respond to observed conditions to the responsible party with your concerns and confirm in writing (an example of final documentation wording can be found on page 14 of handout.)

In the *"Project Delivery Problems: Techniques for Minimizing Their Impacts"* seminar presented by Jeffrey Busch, we were educated on the problems that never go away and are experienced on all projects. As the PM, it all comes down to you, how well you can deliver, and there are two tasks on every project that will consume vast amounts of your time: 1. Dealing with people, and 2. Taking care of problems. Though I won't go into all the problems a project can run into that were discussed, I will share some techniques given for managing project problems:

(Continued on Page 11)

EDSymposium 2012 (Continued)

- State to the team "It's a 'Project Problem' that WE need to fix." DON'T place blame with 'Who.' This makes everyone work together!
- DO IT RIGHT THE FIRST TIME!
- Assess risk early.
- Don't wait to see what happens.
- Talk to people on the project team and find out best way to communicate with them.
- Ask, "How shall we do this?" and work out processes and define the project plan.
- Measure cost, schedule and performance. Define expectations up front.
- Present the facts.
- Use the budget that is in place.
- When an issue or problem arises, DON'T let go of it until it is resolved.
- Maintain control – it starts with you first, then your team.

The most exciting take-away in this seminar was the Problem Solving Example on page 19 of the handout. It is a problem resolution tool that is filled in by the project team in order to present to senior management for a decision. It is designed to be short and concise and to the point. It presents the status of the existing project problem and the impact on Cost, Schedule and Performance (CSP) along with multiple alternatives that can resolve the problem and the impact.

While there were a couple of fun and lively sessions held during convention, the most interactive session I attended was the *"ExCom / Committee Chair Roundtable Discussion – Learn More about Serving at the National Level,"* facilitated by the incomparable Judy Beebe. A chairperson from each committee was there to talk about what they liked best about the committees they worked on and answered questions the attendees may have had. Many of these individuals agreed that working on these committees was very rewarding, and they learned more from these roles than what they gave, and that it's a great opportunity to build and develop leadership skills.

One of my questions was "How much time is required to work on a certain committee?" Well, you can read the descriptions and time requirements of all the committees by going to the national website under the Member Resources tab and clicking on National Committees. My take-away from this session is to take the first step in my goal to become the SDA National President, and after attending this roundtable and listening to all of those who shared their stories, I realized my interest will start and lie in the EdSymposium committee. The following week after convention, I emailed Peggy Pearl at National headquarters and let her know of my interest. I also filled out the online Committee Interest Form, and today... I had my first chat with next year's chair, Joanne Hinsley. So if you are sitting at your desk feeling unmotivated, lacking in event planning skills and wish to have some passion in your life... join this committee, and we'll motivate you while you build confidence as you perform your tasks on your desired subcommittee for planning and executing next year's national convention.

I have a lot more I can write in this article, but to sum it up, remember... **it's not just about the information you take home with you... it's what you do with it after you get back in your office.** You can present what you learned like I have been doing, by writing a summary of each of the sessions you attended, highlighting certain take-aways, and share one a week through an e-mail. These weekly e-mails to principals, managers and co-workers give them time to read each of your summaries at their leisure, and showcase all that you've learned at an SDA convention. You may have a principal or manager who is resistant to change, so you will have to spark the initial motivation to get things moving. But if not... who knows, six months from now they might remember reading one of your summaries and come back and want to utilize what you learned.

Recently Completed Projects



The Reserve Assisted-Living Senior Facility Thousand Oaks

Architect: Irwin Partners Architects
SDA Member: Cindy Loomer,
Irwin Partners Architects

OCTA Metrolink Station Parking Structure Tustin

Architect: Watry Design
Construction Manager: Griffin Structures,
Inc.
SDA Member: Karen Henderson,
Griffin Structures, Inc.



Cars Land Disney California Adventure Park Anaheim

Landscape Architect: Disney
Imagineering
Landscape Sub-Contractor: Valley-
Crest Landscape Development
SDA Member: Cheryl Mathes,

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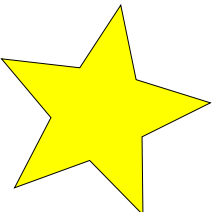
An ESOP Company

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Karen Henderson
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And thanks to our fabulous proofreader
and photographer,
Betsy Nickless!

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The Commentary

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