CORE COMPETENCIES FOR PRINCIPALS 2010-2011

A NINE-PART INTEGRATED CONTINUING EDUCATION CURRICULUM FOR DESIGN FIRM PRINCIPALS

Core Competencies for Principals:

We are pleased to present the ninth offering of **Core Competencies for Principals** (CCP), an integrated series of nine seminars that provides a local, affordable and accessible means to train key staff. Our faculty is comprised of local experts, who are acknowledged, both locally and nationally, as leaders in their areas of expertise. The course has been carefully designed to provide the following features:

» **A Cohesive Seminar Series**. The program is designed as a series, with cohesive curriculum covering the spectrum of subjects important to aspiring principals.

» **Offered Annually**. The curriculum will be offered annually as a consistent means of providing, on a local level, a standardized path for training emerging leaders and senior managers of engineering companies.

» **A Limited Attendance Series**. Attendance will be limited to maximize learning and to ensure meaningful interaction and exchange of ideas.

» **Setting a Standard**. We are setting a new standard for training future leaders. Participants will be eligible for a total of 36 PDHs and will receive an “ACEC Washington Certificate of Completion” upon completion of the series.

» **ACEC Recognition**. ACEC Washington will recognize, on our web site and annually at our Fall Conference, the participants who complete this series, as the acknowledged leaders of tomorrow.

Who Should Attend?

The direction and success of a firm is directly related to the strategic and management decisions made by the firm Principals. This seminar series is designed as an integrated series of classes that build on each other and provide you with a broad foundation of business tools and knowledge to anticipate and handle the added responsibilities that come with the position of firm Principal.

New/Aspiring Principals. The skills and information presented in Core Competencies for Principals are essential building blocks of business knowledge. This integrated series will provide not only “the basics” but will take them a step farther by relating them to each other. The seminar series will challenge you by providing assigned readings prior to class that will add value to the in-class presentations and discussions.

Established Principals. If you are an established Principal, this series will round out your understanding of the big-picture business of consulting, as well as provide insights into how to use your own personal leadership style to maximum impact and effectiveness.

Reaching or aspiring to the level of firm Principal requires a high-achieving approach to your career. CCP will provide aspiring, new, and established Principals with the foundational building blocks required to achieve success in this responsible though highly diverse role.

Schedule of Activities

Pre-Class Social:
September 2, 2010 (Thursday evening) Pre-Class Social at Gordon Biersch

Class Schedule:

September 7, 2010	Leadership & Personal Development I Ed Edelstein
October 12, 2010	Finance & Accounting I David James & Dave Katri
November 9, 2010	Ownership Transfer Planning I Mike Hall
December 14, 2010	Political Involvement I Bill Garrity & Cliff Webster
January 11, 2011	Contracts & Liability I Stan Beck
February 8, 2011	Human Resources I Jan Harding & Nancy Komola
March 8, 2011	Strategic Marketing I Randy Tuminello
April 12, 2011	Strategic Planning I John Pruitt
May 3, 2011	Forum & Certification I Students & Instructors

All classes are held Tuesdays, 8:00 a.m. to noon, at The Coast Bellevue Hotel, Oak Room I 625 – 116th Ave. NE, Bellevue (425.455.9444)

*Registration deadline is June 30, 2010, and remember class size is limited.

The Series

Thursday, September 2, 2010
Pre-class Social | Students & Instructors

Gordon Biersch, 6:00 - 8:00 p.m.
Beer, wine & pizza! Students & Instructors invited to join.

Tuesday, September 7, 2010
Leadership/Professional Development | Ed Edelstein

- Clarify what "Leadership" means: to you; to people who look to you for leadership; to owners who select new firm leaders
- Assess your own natural leadership style, skills and exposures
- Identify the characteristics of Truly Effective Leadership Teams
- Learn ways to improve you own and your team's effectiveness
- Develop your own Leadership Development Program

Ed Edelstein is a member of the ACEC of Washington who facilitates leadership development and ownership transition programs for professional service firms and closely held businesses. An invited speaker at national meetings, Ed has led the "Leadership and Personal Development" segment of the Core Competencies for Principals program since it's inception in 2001. He has worked with many ACEC member firms on matters ranging from dealing with difficult partners to writing and actually implementing strategic plans. Ed holds degrees from the Wharton School and the London School of Economics; held management and internal consulting positions at IBM and has taught at the college level.

Tuesday, October 12, 2010
Finance and Accounting | David James and Dave Katri

- Improve your firm's organizational effective and financial outcomes by understanding the key concepts underlying financial statements.
- Keep your firm on track by learning how to build a "dashboard" for key financial indicators, and benchmarking financial data to industry peers.
- Provide timely and accurate financial information by implementing effective financial management, including sound internal controls.
- Create maximum flexibility for tax planning strategies and ownership transition through appropriate choice of entity type.
- Understanding the opportunities and pitfalls of contracting with governmental agencies and how the accounting process is impacted.

David James is an audit and accounting shareholder with Clark Nuber, a nationally-recognized CPA based in Bellevue, Washington. Clark Nuber's practice focus is on privately held commercial businesses, not-for profit organizations, and high net worth individuals, offered through more than 120 professionals. David has been in the practice of public accounting since 1981 and serves a number of engineering and other professional service businesses. David is past Quality Control Director for the firm's audit practice, and past member of the firm's Management Board. A graduate of Eastern Washington University, David is a Certified Public Accountant and a Certified Management Accountant.

David Katri is a shareholder and Chief Executive Officer of Clark Nuber. Prior to joining Clark Nuber in 2000, Dave served in financial accounting, operational management and executive leadership roles with Fluke Manufacturing over a span of approximately 22 years. In his executive leadership roles with Fluke and Clark Nuber, Dave focused on strategic direction for the firms, and using financial data to evaluate current and future organizational effectiveness. Dave is a CPA and current member of the Board of Directors of the Washington Society of CPA's and the Leading Edge Alliance. He obtained his undergraduate degree in Economics at University of California – Davis, and MBA from UCLA.

Tuesday, November 9, 2010
Ownership Transfer Planning | Mike Hall

» See how an Ownership Transfer Plan is the process of building and maintaining a long-term capital base that takes 10-15 years to implement

» Learn two methods to value an engineering consulting practice

» Understand the common terms that are contained in Buy/Sell Agreements

» Learn how an ESOP can accelerate ownership transfer

» A detailed case study that shows an Ownership Transfer Plan requires the integration of several areas, including an incentive compensation system, profit distribution policies, business valuation, investment incentives, buy/sell terms and leadership development

Michael Hall, the President of Hall & Company, has worked with over 200 consulting engineering firms nationwide. He specializes in developing ownership transfer plans, strategic planning and negotiating mergers and acquisitions for architects and engineers.

Mike has an MBA from Harvard Business School and a civil engineering degree from the University of Washington. He has worked as a consulting engineer and as the financial manager for an A/E firm. Hall & Company also provides professional liability insurance brokerage and recruiting services to design professionals and currently employes 35 people in Poulsbo.

Tuesday, December 14, 2010
Engineering Power in Politics | Bill Garrity, President/CEO, ACEC Washington; and Cliff Webster, AELC Lobbyist

» Learn the 5 ways to influence the political process

» Live a "day in the life" of a newly elected legislator

» Legislative Program mission & issues

» Discover how to be a more effective constituent

Bill Garrity is President/CEO of the American Council of Engineering Companies of Washington. He has been with ACEC over 15 years, and has more than 25 years experience in association management, all with construction related trade associations. In addition to ACEC Washington, Bill has served as President of the Washington Construction Industry Council from 2006 to 2009. He was President of the National Association of Engineering Council Executives and served on the ACEC National Executive Committee in 2004-2005. Currently, Bill serves on the ACEC National Government Affairs Steering Committee and the ACEC Planning Cabinet.

Bill is a graduate of Loyola University of Chicago, where he received his bachelor's degree in psychology in 1969. He completed his postgraduate studies at Northeastern College and the Forest Hospital Postgraduate Center for Mental Health Education in 1971. Bill and his wife, Kathleen, reside in Mill Creek, WA, with their daughter, Megan.

Clifford A. (Cliff) Webster is a principal with the Seattle law firm of Carney Badley Spellman, P.S., where he heads the firm's legislative and administrative practice group. He is also a member of the firm's Board of Directors and Director of Associates. Since joining the firm in 1983, he has represented businesses and business and professional trade associations before the state legislature and a variety of state agencies on matters related to taxation, liability, health care, communications, insurance, transportation, government procurement, business regulation and professional licensing.

Cliff is chairman of the Washington Liability Reform Coalition and served on the board of directors of the American Tort Reform Association. In 2004, he served a one-year term as chairman of the State Capital Group. He also is a member of the leadership council of the National Federation of Independent Business.

Tuesday, January 11, 2011
Contracts & Liabilities | Stanton Philip Beck

- How to minimize risk
- The role of insurance in contracts
- Time limitations on claims and collections
- How to include Limitation of Liability in your contracts
- What indemnification is and how to interpret and modify indemnity clauses
- How to protect your design work

Stan Beck is a member of the Board of Directors and Chairman of the Construction Services Group of Lane Powell PC. He received his engineering and law degrees from the University of Washington, where he graduated with honors and served as editor of the Law Review. He has been involved in most of the major construction projects in the Pacific Northwest, as well as in complex product liability actions for numerous product manufacturers and is nationally recognized for his work. He currently serves as panel counsel for owners, design firms, insurers and product manufacturers, as well as for numerous professional organizations and societies. He also has an active motorsports practice and counsels teams, manufacturers and sponsors in all aspects concerning the racing industry.

Tuesday, February 8, 2011
Human Resources | Jan Harding and Nancy Komola

- Create a better understanding of the Principal's role in key arenas of Human Resources
- Enhance your understanding of the intent and implications of current employment laws and practices regarding Sexual Harassment, the Fair Labor Standards Act (FLSA, exempt and nonexempt status) and the Americans with Disabilities Act (ADA)
- Identify tools and techniques that will improve your ability to source, select and hire the right person the first time

» Discover ways to encourage competent performers to make the most of their abilities, plus effective techniques for discussing and addressing performance issues

» Determine what motivates your employees, which greatly enhances your ability to retain your best people

Jan Harding, SPHR founded HRnovations in 1990. Her expertise covers all strategic aspects of human resources, including training and development, organizational assessments, employee development and involvement programs, and innovative recognition and reward systems that link pay and performance with business needs. Prior to founding HRnovations, Jan was Vice President of Human Resources at McCaw Cellular Communications, Inc. and Director of Human Resources for Washington Public Power Supply System. Jan has a BA in Business and Communication from Eastern Washington University and earned the Senior Professional in Human Resources certification (SPHR).

Nancy Komola, SPHR, Principal, is responsible for assisting clients with employee relations issues, organizational and development needs assessments, training programs, compensation, leadership development, and communication. Nancy has more than twenty years of experience as an HR generalist practitioner, business partner, and trainer. Prior to joining HRnovations in 2004, Nancy spent 17 years in the industrial manufacturing industry, most recently as western regional HR manager for Borden Chemical, Inc. Nancy attended City University while working toward a BS in Business and has earned the Senior Professional in Human Resources certification (SPHR).

Tuesday, March 8, 2011
Strategic Marketing | Randy Tuminello

- » What is strategic marketing and how does it align with a firm's overall business approach
- » Determining your 'identity' and why this is important to achieve a competitive advantage
- » How to achieve an optimal firm position
- » Harnessing the power of relationship marketing
- » Why clients say yes: how to wire the job
- » How to mentor and motivate your marketing staff
- » How to create a client-focused practice

Randy Tuminello is the Senior Vice-President for PSF, a Seattle-based specialty construction and facilities solution provider. In this role he is responsible for the firm's strategic planning, marketing, and its business consulting practice.

Previously he was the Founder and President of TrustBuilders International, a management and marketing solutions firm nationally recognized for its work in sales and client relations. Randy speaks regularly at various professional meetings and conferences, and was previously the author of the "Client Coach"—an advice column that appeared bi-weekly in the Seattle DJC. He is also the author of the popular book *What You Need to Know about Doughnuts*. Randy holds an MBA in Marketing and Finance and is also a Certified Professional Project Manager (PMP).

Tuesday, April 12, 2011
Strategic Business Planning | John Pruitt

- » Understand what Strategic Planning is
- » Step-by-step process for developing a Strategic Plan
- » Better understanding of business structure options
- » Methods for structuring a successful planning retreat
- » Executing the Strategic Plan. Translating the Plan into meaningful, "bite-sized" initiatives

John Pruitt, founder of A/E Consulting Services, Inc., has developed a national reputation as a strategic planning and management expert for engineering and architectural firms. John advises firms on a variety of topics, including ownership transition planning, mergers and acquisitions, strategic and business planning, contracting with the government (FARS) and audit defense, staff development and retention issues, company valuations, employee compensation planning, and firm performance issues. He has worked effectively with a variety of A/E firms - ranging from start-up companies to firms with over 6,000 staff members.

John is a CPA, CVA, holds an MBA in Finance, and has been awarded a Certificate of Achievement in Business Valuations by the AICPA. Currently, he is a member of the American Institute of Certified Public Accountants, National Association of Certified Valuation Analysts, and the Institute of Business Appraisers. John is a frequent speaker at seminars and professional conferences.

Tuesday, May 3, 2011
Open Forum & Certification - All Faculty Present

» What Does It All Mean? - Integrating the Concepts

» Real Life Experiences - Faculty and Students in the Trenches

» Presentation of Certificates of Completion

» 36 PDHs awarded for attending all nine sessions

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Register online at: acec-wa.org/programs/ccp.html

REGISTRATION Form for Core Competencies for Principals 2010-2011 Session

Name: ____

Firm: ____

Phone: _____________ E-Mail: _______________________________

Participation Fee: $1,750 for ACEC Washington Member Firms | $2,750 for Non-member firms. Please make your check payable to **ACEC Washington** and mail along with registration to 700 – 112th Ave. NE, Bellevue, WA 98004; or fax to 425.451.3521.

The participation fee includes:
- » Pre-Class Social at Gordon Biersch in Seattle (beer, wine & pizza!)
- » Nine, four-hour sessions, resource materials, buffet breakfasts
- » Lunch as part of the final session.

Participants are required to attend all sessions (no substitutes are accepted) to receive a Certificate of Completion. Make-up sessions are available within one year @ $100 per session. 36 Professional Development Hours (PDHs) are awarded for attending all nine sessions.

☐ Payment Enclosed

Deadline for registration is June 30, 2010