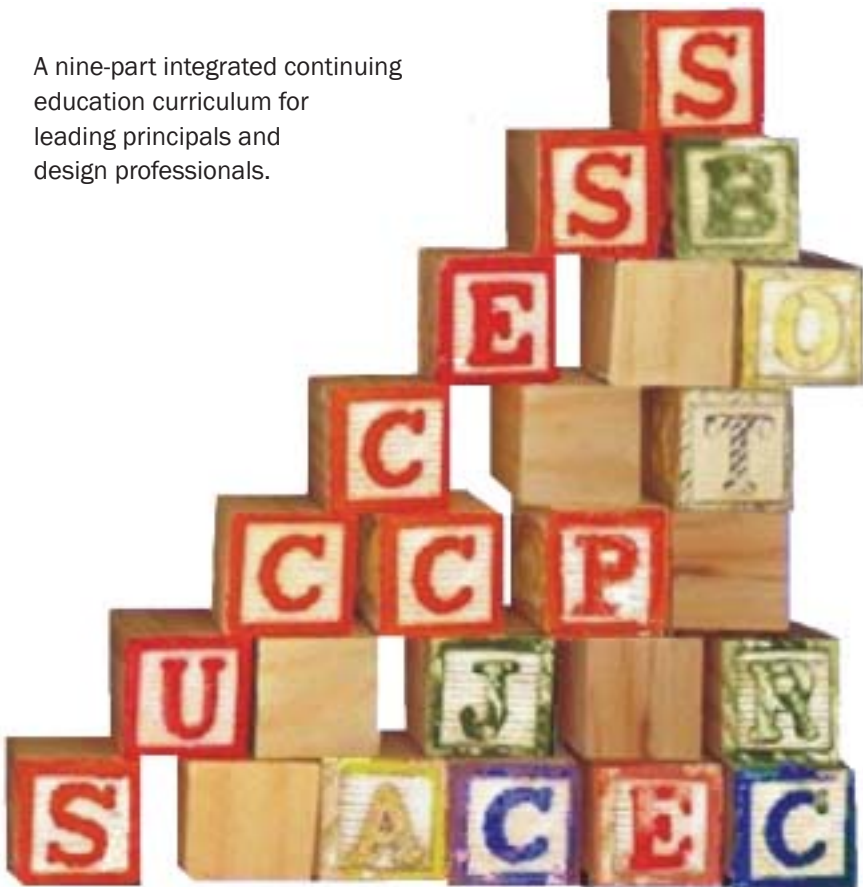


# ACEC *Washington*

## **CORE COMPETENCIES FOR PROFESSIONALS 2011-2012**

A nine-part integrated continuing education curriculum for leading principals and design professionals.



## Core Competencies for Professionals:

We are pleased to present the 11th offering of Core Competencies for Professionals (CCP), an integrated series of nine seminars that provide a local, affordable and accessible means to train key staff. Our faculty is comprised of local and national experts who are acknowledged 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 principals and senior design professionals.

**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 finishing the series.

**ACEC Recognition.** ACEC Washington will recognize, on our website 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 being senior design professionals and principals.

**Design Professionals.** The skills and information presented in Core Competencies for Professionals are essential building blocks of business knowledge. This integrated series will provide not only “the basics” but will take them a step further 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 a leading design professional 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 7, 2011 (Wednesday evening) Pre-Class Social at Gordon Biersch

### Class Schedule:

September 13, 2011	Leadership & Personal Development   Ed Edelstein
October 11, 2011	Finance & Accounting   David James & Karen Ledbetter
November 8, 2011	Building Shareholder Value and Ownership Transition Planning   David Cohen
December 13, 2011	Political Involvement   Bill Garrity & Cliff Webster
January 10, 2012	Contracts & Liability   Stan Beck
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March 13, 2012	Strategic Marketing   Randy Tuminello
April 10, 2012	Strategic Planning   John Pruitt
May 1, 2012	Forum & Certification   Students & Instructors

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

\*Registration deadline is June 30, 2011, and remember class size is limited. Registration is confirmed on a first-come, first-served basis.

## The Series

**Wednesday, September 7, 2011**

### **Pre-class Social | Students & Instructors**

Gordon Biersch, 5:30 - 7:30 p.m.

Beer, wine & pizza! Students & Instructors invited to join.

**Tuesday, September 13, 2011**

### **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 your 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 its inception in 2001. He has worked with many ACEC member firms on matters ranging from dealing with difficult partners to writing and 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 11, 2011**

## **Finance and Accounting**

**David James and Karen Ledbetter, Clark Nuber**

- » Improve your firm’s organizational effectiveness and financial performance by understanding the key concepts underlying financial statements.
- » Keep your firm on track by learning the basic building blocks for a “dashboard” of key financial indicators and how to benchmark your firm’s financial data to industry peers.
- » Explore the costs and benefits of timely and accurate financial information, effective financial management and sound internal controls.
- » Understand the opportunities and pitfalls of cost reimbursement fee arrangements with governmental entities, including a working definition of a “good overhead rate” for government contracts.
- » Overview of tax entity choice and resulting impacts on current and future tax consequences, including ownership transition.

David James and Karen Ledbetter are both CPAs practicing with Clark Nuber ([www.ClarkNuber.com](http://www.ClarkNuber.com)), an award-winning CPA firm based in Bellevue, Washington. David, a shareholder of the firm and a graduate of Eastern Washington University, focuses his practice on financial statement reporting and general business consulting for privately-owned commercial businesses. Karen, a senior manager and graduate of Western Washington University, has extensive experience in public accounting and private industry accounting. Both David and Karen serve a client base that includes a growing number of engineering and consulting firms.

**Tuesday, November 8, 2010**

## **Building Shareholder Value and Ownership Transition Planning**

**David Cohen, Matheson Advisors**

This session will help attendees understand the key value drivers, the valuation process, and the relationship to ownership transition planning. In addition, we will uncover the overall financial aspects of ownership transition plans and the various tools that can be implemented to create such a transition.

- » Understand the impact of the economy on valuation and ownership transition planning.
- » Learn how to maximize value and return on investment, and how to build transferable value in their firms.
- » Learn ways to structure exit strategies and ownership expansion programs and understand the leadership identification and development steps to pursue in order to promote transition success.
- » Understand the various valuation methodologies and what impact the economic downturn has on these methods, above and beyond revenue, profits, backlog, and staff size.

David Cohen, Managing Director of Matheson Financial Advisors, brings over a decade of experience in consulting Architecture, Engineering, and Environmental Consulting clients on ownership transition, business valuation, financial management, and mergers and acquisitions (M&A). As an expert in the industry and financial advisory services, David has worked with over 500 firms across the United States and conducts seminars on the topics of financial management, valuation, ownership transition planning, and M&A for the design industry. In addition, he leads in-house educational presentations for firms nationwide, is an instructor for the ACEC Business of Design Consulting Program, and speaks at ACEC and AIA National and State programs. David earned both his BBA and JD from the University of Miami and is licensed to practice law in Florida and Massachusetts. Furthermore, he has earned the Accredited Senior Appraiser designation from the American Society of Appraisers.

**Tuesday, December 13, 2010**

## **Engineering Power in Politics**

**Bill Garrity, 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.

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 10, 2012**

**Contracts & Liabilities**

**Stanton Philip Beck, Lane Powell**

- » 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 14, 2012**

## **Human Resources**

**Jan Harding and Nancy Komola, HRnovations**

- » 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 13, 2012**

**Strategic Marketing**

**Randy Tuminello, PSF 360**

- » How to determine your firm's identity and why this is central to strategic marketing
- » A comparison of the four basic business models and how this relates to strategic marketing
- » How to achieve an optimal market position
- » Why 'relationship marketing' is the right philosophy and approach for professional services
- » How to organize your marketing and business development program for success
- » Why clients say yes: how to wire the job

Randy Tuminello is the Senior Vice President for PSF 360, a major mechanical design/build contractor based in Seattle. He is a member of ACEC Washington and has led the "Strategic Marketing" segment since 2005. Randy speaks regularly at national and regional conferences on client relations, marketing and project management. He has authored a bi-weekly advice column in the Seattle DJC entitled the 'Client Coach' since 2001 and is also the author of the popular marketing and business development book, *What You Need to Know about Donuts*. Randy holds an MBA in Marketing and Finance and is also a Certified Professional Project Manager (PMP).

**Tuesday, April 10, 2012**  
**Strategic Business Planning**  
**John Pruitt, A/E Consulting Services**

- » 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 1, 2012**  
**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: [www.acec-wa.org/programs/ccp.php](http://www.acec-wa.org/programs/ccp.php)

### REGISTRATION

Core Competencies for Principals 2011-2012 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 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, 2011