



AMERICAN COUNCIL OF ENGINEERING COMPANIES
of Washington

Core Competencies for Professionals

8-part integrated continuing education curriculum
for leading principals and design professionals



2021-2022 Program



Core Competencies for Professionals

We are pleased to present the 21st offering of Core Competencies for Professionals (CCP), an integrated series of eight seminars that provide a regional, 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, Offered Annually. The program is designed as a series, with cohesive curriculum covering the spectrum of subjects important to principals and senior design professionals. The curriculum will be offered annually as a consistent means of providing-- on a regional level-- a standardized path for training emerging leaders and senior managers of engineering companies.

Learn Remotely, Network In-Person. The monthly CCP curriculum will be offered virtually to ensure flexibility for participants. We will also hold three in-person networking and social events to deepen connections and build relationships.

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 32 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 Spring Conference, the participants who complete this series, as the acknowledged leaders of tomorrow. Registrants receive free entrance to the conference.

Who Should Attend?

The direction and success of a firm is directly related to the strategic and management decisions made by leading design professionals. 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

September 14, 2021	Leadership & Personal Development ♦ Mike Baker
October 12, 2021	Finance & Accounting ♦ Karen Ledbetter
November 9, 2021	Ownership Transition Planning ♦ David Cohen
December 14, 2021	Political Involvement ♦ Cliff Webster & Van Collins
January 18, 2022	Contracts & Liability ♦ Jennifer Beyerlein & Andrew Gabel
February 8, 2022	Human Resources ♦ Nancy Komola
March 8, 2022	Strategic Marketing ♦ Randy Tuminello
April 12, 2022	Strategic Planning ♦ Steve Walker
	Graduation at ACEC Spring Conference

All Classes are held on Tuesdays, 8:00 a.m. to noon, via Zoom.

In addition to monthly online classes, we will hold three in-person networking events in the Puget Sound area throughout the program.

Leadership/Professional Development

Tuesday, September 14, 2021

Mike Baker, Aitken Leadership Group

- » Understand leadership and 'personal mastery' as part of lifelong pursuit of excellence in professional services
- » Identify personal leadership challenges commonly facing AE professionals today
- » Consider the challenges and opportunities of working in a 'relationship business'
- » Understand how to recognize personal 'blind spots' and development opportunities
- » Define the personal 'toolkit' needed to achieve the next level of leadership success

Mike is a former decorated active duty Army officer and is a vice president for the mid-sized A&E firm where he's worked for the past 19 years, David Evans and Associates, Inc. He's a regional business development leader and consulting alternative project delivery subject matter expert to FHWA. He specializes in designing and implementing collaborative partnering and engagement processes with his clients on high impact projects that are politically charged and stakeholder intensive. The combined construction value of his last six projects exceeds \$5-billion. Since 2003, Mike has led his firm's Future Leader program- an immersive early career experience that equips participants to reach, and coach others to reach, higher personal and professional performance levels. Mike helps people access their 'aha' moments and inspire them to apply new learning and ideas to their practical day-to-day lives with increased energy and accountability.

Finance and Accounting

Tuesday, October 12, 2021

Karen Ledbetter, Clark Nuber, P.S.

- » 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.

Karen Ledbetter is a CPA practicing with Clark Nuber, P.S. (www.ClarkNuber.com), an award-winning CPA firm based in Bellevue, Washington. Karen is a shareholder in the firm and a graduate of Western Washington University. She focuses her practice on financial statement reporting and general business consulting for privately-owned commercial businesses. She has extensive experience in public accounting and private industry accounting. Karen serves a client base that includes a large number of engineering and consulting firms.

Shareholder Value & Ownership Transition Planning

Tuesday, November 9, 2021

David Cohen, Matheson Financial 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.

Engineering Power in Politics

Tuesday, December 14, 2021

Cliff Webster, AELC Lobbyist and Van Collins, ACEC Washington

Discover:

- » What is Advocacy, and why should we do it
- » 5 Factors of Influence
- » 4 Principles of Effective Legislative Advocacy
- » Key elements of a winning message
- » The Power of Personalizing

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.

Contracts & Liabilities

Tuesday, January 18, 2022

Jennifer Beyerlein and Andrew Gabel, 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

Jennifer McMillan Beyerlein is Chair of the Firm's Construction Team and concentrates her practice on construction litigation and drafting and negotiating complex construction contracts on behalf of design professionals, private and public owners, and contractors. She has a diverse background that includes representing architecture and engineering firms in malpractice claims, private owners and developers, and municipalities and public owners on various public works projects. She has extensive experience defending large claims on public works projects, representing utility districts, schools, counties, cities, and transportation agencies on a broad range of topics, including tunneling, differing site conditions, and defective specifications. She also assists in evaluating potential legal risks, insurance considerations and contractual solutions surrounding green and sustainable construction.

Andrew is a member of Lane Powell's Construction and Environmental Practice Group and concentrates his practice on representing design professionals, public and private owners, contractors, product manufacturers and insurers. He has handled complex construction and real estate matters involving alleged design errors, cost overruns, lease disputes and insurance coverage disputes. In addition, he has significant trial and arbitration experience in both construction and real estate matters.

Human Resources

Tuesday, February 8, 2022

Nancy Komola, FitwellHR

- » Create a better understanding of the design professional'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

Nancy Komola, SPHR, is Principal at FitwellHR and the Director of Human Resources at Wood Harbinger. At the firm she responsible for employee relations issues, organizational and development needs assessments, training programs, compensation, leadership development, and communication. Nancy has more than 25 years of experience as an HR generalist practitioner, business partner, and trainer. Prior to joining Wood Harbinger, Nancy was the Prinicpal of HRnovations, an HR consulting firm. 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).

Strategic Marketing

Tuesday, March 8, 2022

Randy Tuminello, KSA

- » Defining and understanding the four main drivers of strategic marketing – Purpose, Plan, Performance and Promotion
- » How to determine your firm’s identity and why your identity impacts every facet of your strategy – from the type of clients and projects you pursue to the types and levels of staff you hire to the way you price your services
- » How to develop a strategic marketing plan to achieve an optimal market position
- » How to organize your marketing and business development program for success

Randy Tuminello is the Director of Business Development at KSA, an industry leader, providing a broad range of consulting, management, engineering, architecture, planning, surveying, and construction management services for 38 years. KSA serves hundreds of clients throughout Texas, Louisiana, Arkansas, New Mexico and Oklahoma and is a leader in preparing design solutions to clients in municipal, county, state, and federal governments, as well as river authorities, utility districts, water supply corporations, private industry, developers, and architects. Randy is ultimately responsible for market strategy, client relations, and business development for the firm’s offices spread throughout the U.S. Prior to his work with KSA, Randy was the owner of TrustBuilders, a widely respected business consulting firm specializing in the AEC industry. This year will mark Randy’s 14th anniversary as instructor for the “Strategic Marketing” segment. Randy holds an MBA and is also a Certified Professional Project Manager (PMP).

Strategic Business Planning

Tuesday, April 12, 2022

Steve Walker, S&H Consulting

- » Strategic planning best practices & how your firm stacks up
- » The “yin & yang” of strategic planning – balancing the external and internal business environment for success
- » How to evaluate external business drivers and A/E/C trends to create a robust strategy for growth
- » Tips for making internal improvements and creating a focused agenda for change
- » Implementing strategies that ensure success (or if ignored, can lead to failure)

The session will be very interactive and leverage small group activities for participants to learn and apply the concepts. Learning objectives include: being able to evaluate the robustness of their current strategic planning process, organize firm’s goals into a coherent strategy map using Balanced Scorecard concepts, being able to apply a proven approach to evaluate growth opportunities, being able to apply techniques to create an internal change agenda for the firm, and to assess issues with strategic implications for the future.

Steve is the president of SR Walker and Associates, Inc., a professional service consulting firm providing strategic planning, marketing and management consulting, training and coaching services. SRWA has supported a diverse mix of clients including Architecture and Engineering (A/E) firms ranging from a four-person Public Involvement consultant to several Engineering News Record top 20 international A/E firms; from a one-person start-up minority civil designer to one of the world’s largest heavy civil construction companies. Steve has coached and supported marketing programs around the world.

His experience includes strategic planning, development of market strategies, leadership of major sales pursuits, business development training, customer perception and image surveys, image and branding strategies, facilitation and conflict resolution. He brings 30 years of professional engineering experience and an additional 10 years of construction and construction management experience to his operations, marketing and project management roles.