



AMERICAN COUNCIL OF ENGINEERING COMPANIES
of Washington

Core Competencies for Professionals

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



2023-2024 Program



Core Competencies for Professionals

We are pleased to present the 23rd offering of Core Competencies for Professionals (CCP), an integrated series of nine 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.

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 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

All Classes are held on Tuesdays, 8:00 a.m. to noon in Bellevue, WA

September 12, 2023	Leadership & Personal Development	Mike Baker
October 10, 2023	Finance & Accounting	Karen Ledbetter
November 14, 2023	Ownership Transition Planning	David Cohen
December 12, 2023	Negotiation Skills	William Long
January 9, 2024	Contracts & Liability	Jennifer Beyerlein & Andrew Gabel
February 13, 2024	Human Resources	Nancy Komola
March 12 2024	Strategic Marketing	Randy Tuminello
April 9, 2024	Strategic Planning	Steve Walker
May 14, 2024	Diversity, Equity & Inclusion	Dr. Ed Hubbard

Leadership and Personal Development

September 12, 2023

Mike Baker, Aitken Leadership Group

- Understand leadership and 'personal mastery' as part of a 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 over 20 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

October 10, 2023

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.

Building Shareholder Value & Ownership Transition Planning

November 14, 2023

David Cohen, Matheson Financial Advisors

- Understand the key value drivers, the valuation process, and the relationship to ownership transition planning. 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 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.

Negotiation Skills

December 12, 2023

William Long, WRL Consultants, LLC

- Understand how proposal pricing strategy impacts your contract negotiation strategy
- Utilize risk management techniques to prioritize elements for negotiation
- Understand the impact that interactive, collaborative communication can have on the negotiation process
- Select the style to employ for greatest success when negotiating
- Identify the 'root causes' that will make the negotiating process more effective and efficient
- Implement techniques to effectively negotiate changes on projects

William R. Long is a Principal with WRL Consultants, LLC. Over his thirty-five-year career, Bill has held multiple positions at both design and construction firms including Principal, VP, Director of Business Development, and Project Engineer. His expertise has evolved into providing effective consulting to firms in the industry as well as leading intensive coaching and training to the staff at these firms. Focusing on topics incorporating strategic planning, organizational management, business development, firm leadership, and project management, Bill's passion is positioning firms and individuals for a successful future. Bill is also an Adjunct Professor in Drexel University's College of Engineering.

Contracts and Liability

January 9, 2024

Jennifer Beyerlein and Andrew Gabel, Lane Powell

- Learn how to minimize risk
- Understand the role of insurance in contracts
- Learn the importance of time limitations on claims and collections
- Discuss how to include Limitation of Liability in your contracts
- Learn what indemnification is and how to interpret and modify indemnity clauses
- Know how to protect your design work

Jennifer McMillan Beyerlein is Chair of the Firm's Construction Team and focuses on construction litigation and drafting and negotiating complex construction contracts on behalf of design professionals, private and public owners, and contractors. Her background includes representing A&E 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.

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

February 13, 2024

Nancy Komola, Fitwell HR

- 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, and the Americans with Disabilities Act.
- 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 addressing performance issues.
- Determine what motivates your employees, which greatly enhances your ability to retain the best people.

Nancy Komola, SHRM-SCP, SPHR, is Principal of FitwellHR and brings over 25 years' experience as an HR practitioner, business partner, and training facilitator. Nancy is responsible for leading FitwellHR's *ELEVATE* Manager Success Training and is an instructor for the University of Washington's HR certification program. Nancy also assists clients with customized training and leadership development, employee relations issues, communication, HR assessments, and has conducted numerous harassment and discrimination investigations in the U.S. and Canada.

Strategic Marketing

March 12, 2024

Randy Tuminello, Tuminello Consulting

- Define and understand the four main drivers of strategic marketing – Purpose, Plan, Performance and Promotion
- Learn 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
- Understand how to develop a strategic marketing plan to achieve an optimal market position
- Organize your marketing and business development program for success

Randy Tuminello is the CEO and Principal consultant at Tuminello Consulting. For over 30 years, Randy has provided a wealth of integrated expertise as a consultant to the AEC industry and various public agencies. His work includes business strategy, professional development programs, mergers and acquisitions, training and coaching and project management expertise in a wide variety of consulting and community planning projects. He is a frequent speaker at regional and national level professional association meetings, and has written over 100 articles client relations, leadership, professional development, project management, and marketing strategy.

Strategic Business Planning

April 19, 2024

Steve Walker, SR Walker & Associates, Inc.

- Understand strategic planning best practices & how your firm stacks up
- Understand the “yin & yang” of strategic planning – balancing the external and internal business environment for success
- Learn how to evaluate external business drivers and A/E/C trends to create a robust strategy for growth
- Hear tips for making internal improvements and creating a focused agenda for change
- Implement strategies that ensure success (or if ignored, can lead to failure)
- Use the Balanced Scorecard approach to apply a proven technique to evaluate growth opportunities.

Steve is the president of SR Walker and Associates, Inc., a professional services consulting firm providing strategic planning, marketing and management consulting. He has supported a diverse mix of clients including A/E firms of all sizes, from a one-person start up to one of the world’s largest heavy civil construction companies. He has coached and supported marketing professionals around the world. Steve’s experience includes strategic planning, development of market strategies, leadership of major sales pursuits, customer perception and image surveys, and more. He brings over 30 years of professional engineering experience and an additional 10 years of construction management experience to his operations, marketing and PM roles.

Diversity, Equity and Inclusion

May 14, 2024

Dr. Edward Hubbard, Hubbard & Hubbard.

- Develop a diversity business model strategy that links diversity, equity and inclusion (DEI) to core elements of your business including contracting, operations, sales, marketing and regulatory requirements in measurable terms.
- Create a measurable link between diversity strategic plans and corporate strategic plans
- Learn how to measure diversity utilization and calculate ROI impact
- Show how diversity taps employee assets for innovation and growth
- Learn six inclusive leadership traits and behavioral competencies to drive a high-performance workplace culture

Dr. Edward E. Hubbard is President and CEO of Hubbard & Hubbard, Inc., an international organization and human performance-consulting corporation that specializes in techniques for applied business performance improvement, Diversity Return on Investment measurement and analytics, instructional design and strategic organizational development. He is the author of more than 58 business-related books including the ground-breaking books. Dr. Hubbard was an honoree at the Inaugural International Society of Diversity and Inclusion Professionals where he received the “Living Legends of Diversity Award” He is one of only 18 people in the world who have received this Award. He serves on the Harvard Business Review, Diversity Executive Magazine and Strategic Diversity & Inclusion Management (SDIM) magazine Editorial Advisory Boards, and serves on the Board of Directors for The Ohio State University African American Black Alumni Society.