

Schedule of Events

Thursday, November 3

8:00am-9:00am Education Station Presentation(s)

EDST110322 The Restorative Impact of Perceived Open Space (approved for 1.0 HSW)

Sky Factory

In this course, we explore the impact of interior environments on human performance and wellness.

We explore the role natural daylight and *perceived* open space play in modulating cognitive function, and how architects and designers can engage our memories of natural environments to enhance occupant health and productivity in enclosed interiors.

The course introduces a cognitive approach to design. It investigates the restorative value of *perceived* open space which functions as a healing attribute by engaging our biophilic memory.

Two spatial reference frames present in nature, the *perceived* zenith, the highest point above the observer, and the *perceived* horizon line, the farthest point before the observer, can be recreated in an enclosed interior space by staging an appropriate illusion to alter our perception of space.

Recreating these fundamental spatial maps through an effective illusion enables a range of wellness benefits normally associated with interiors applying more traditional biophilic design principles.

Learning Objectives

1. Explain why reducing daylight to brightness (irradiance) and color temperature in enclosed interiors can alter our perception of daylight's inherent spatial nature.
2. Discuss the role circadian photoreceptors and retinal cones play in regulating circadian entrainment and how the environmental context in which our physiology detects daylight is as important as the light itself.
3. Describe the neural pathways that link our sensorimotor system (how we move through space) with executive function (how we think), thereby generating our sense of place.
4. Summarize the malleable nature of human perception and how bi-sensory illusions in enclosed interiors can evoke spatial memories to alter our perception of those spaces.
5. Analyze the implications of the environment of care on human health and productivity and we can use spatial memories to generate research-verified positive outcomes.

9:05am-10:10am Keynote Presentation

NOV3KN122 Designing a Less Stressful Life and Becoming a BUILDER

Dr. Lawrence Chatters, Executive Associate AD for Strategic Initiatives | University of Nebraska

We do not have to look far to find negativity. There are challenges all around us at home, at work, and in our social lives. Navigating these challenges takes a tremendous amount of energy. Dr. Chatters will discuss these challenges and provide the audience with effective and impactful strategies they can use to decrease stress and build toward a better life. This motivational presentation will facilitate introspection and generate hope.

Learning Objectives

1. Discuss life's inevitable challenges through consistent practice of self-awareness, self-care, and self-introspection.
2. Build a habitual self-care routine by prioritizing personal mental health, in addition to serving others.
3. Recognize, identify, and isolate echo chambers to gain a deeper understanding of varying perspectives to better serve our communities.
4. Create a specific action plan to ensure achievement of personal growth and reduce stress through active listening, purposeful empathy, and relationship building.

10:15am-11:45am Education Sessions

NOV3122 Marketing and Business Development Basics for Small Firm Architects

Emily Hall, Partner, Charrette Venture Group

Small firm architects seldom have a marketing team. They need to dedicate time to marketing and business development but don't know where to start, what works, or how to be consistent. This program is designed specifically for small firm architects who need to develop a strategic marketing/business development program that they can manage effectively.

When it comes to marketing your small architecture firm, where should you focus your efforts? What tactics yield real results? In this workshop, we'll cover the basics of building a strong, differentiated brand for your small firm. We'll also review how to start a marketing strategy and build an actionable marketing plan that is realistic, budget-friendly, and measurable. Finally, we'll discuss how authentic business development is separate from marketing but critical to building profitable relationships.

Learning Objectives

1. Identify the benefits of branding and its relationship with the business and how to develop one that is unique to your firm's culture.
2. Produce an actionable and realistic marketing strategy plan unique to your firm's individual culture.
3. Identify the reasons why business development and marketing are separate.
4. Build profitable relationships by outlining the critical differences between development and marketing.

Thursday, November 3

10:15am-11:45am Education Sessions

NOV3222 Preparing for Ownership Transition-It's Never Too Early

Patricia Harris, Esq., Special Counsel, Zetlin & De Chiarra LLP and CEO, Licensure LLC

Purchases and sales of design professional practices represent a robust marketplace. We are seeing a significant number of purchases and sales because of aging baby boomers who are retiring, the pandemic opening markets geographically, and earnest buyers. A runway of ten years to prepare for these transitions is optimal.

This course is for any practitioner who is considering buying or selling an architectural practice. We will explain the different transition strategies including exits, transitions including internal purchases and sales, sales to third parties and mergers, how to get a business ready for sale, and understanding the legal obligations that will arise in the context of an ownership transition.

Learning Objectives

1. Describe the pros and cons of different types of ownership transition transactions and identify what might be most appropriate for a participant's practice.
2. Prepare a transition plan, including all necessary components, preparing a practice for potential ownership transition.
3. Implement a system of record keeping maintenance to support a successful ownership transition.
4. Define the legal and financial obligations and representations necessary for a successful transaction.

NOV3322 Data Driven Design: Preparing for the Hybrid Future of Work

Melissa Marsh, Executive Director & Founder, PLASTARC

Amy Rosen, Sociospatial Designer, PLASTARC

Though architecture's impact on the social and psychological well-being of humans has been recognized for millennia, less has been done to infuse the myriad insights of the social sciences into the practice of architecture. To be sure, some of the nationally known organizations in the field of sustainability have expanded their programs to address aspects of well-being, or have split off separate programs.

Measuring well-being can be elusive; whether physical, emotional, or environmental. There are more and more research-based approaches that have taken on this challenge. Learn how quantitative and qualitative tools, from national systems to ethnographic research, are being deployed to integrate the role of the social sciences into the practice of architecture.

This session will explore what has been done, what is in the works, and what gaps remain in the important effort to elevate the role of the social sciences in the practice of architecture. Participating organizations will hear emerging best practices, research findings, and case studies from a range of clients including technology, financial, and design firms who are focusing on the intersection of workplace, social sciences, and technology design as a catalyst for transformative change. They will be able to apply key strategies (space, tech, and policies) to theirs and their clients' organizations.

Learning Objectives

1. Prepare the work environment for hybrid work by reassessing workplace strategies and preoccupancy following the COVID-19 pandemic.
2. Evaluate the impact of space plans on health and wellness, human behavior, and productivity to instigate adjustments to current circumstances.
3. Measure the financial impacts of space decisions within the work environment after implementing a data gathering cycle.
4. Compare and contrast varying emerging workplace models in order to decide which offers the highest leverage features to support your individual firm.

11:45am-12:30pm **Lunch Break**
Architect Jeopardy

12:30pm-2:00pm **Education Sessions**

NOV3422 Progress Through Storytelling: How to Win Approval for Innovative Design

Joshua Zinder, AIA, Managing Partner, JZA+D

Pablo David, Vice President of Government Affairs & Community Relations, AJ Capital Partners

Derek Bridger, Zoning Officer/Assistant HP Officer, Zoning Department, Municipality of Princeton, NJ

Small firm practitioners often start a firm with the desire to promote innovative design and to have positive impacts locally and regionally. Understanding what approval-granting authorities are looking for and want to hear from proposals will assist architects who are striving to compete with big firms who bring name recognition and well-developed communication strategies to bear in every proposal and presentation. Telling the compelling story behind your design will present an opportunity to zoning boards and historic

preservation bodies, to opt for a small local firm because they want a project team that is invested in the community.

Various stakeholders often zealously guard against new development to protect and preserve what they believe makes their community special. Requests for permits and variances are often rejected by preservation commissions and local planning and zoning boards, even if the proposed design harmonizes with the architectural and historical context, and even when the development is not only appropriate, but badly needed.

In this session, a practicing architect is joined by a development executive and a zoning board official to discuss successful applications of the principles of storytelling to making cases for approvals of plans for important and innovative adaptive reuse, expansion, and new-build projects to decision-making bodies. The presenters invite attendees to contribute their experiences and challenges, helping identify the “story” behind the proposed development that effectively communicates the benefits for the officials and their city, neighborhood, and home residential units as appropriate density increases.

Learning Objectives

1. Describe and anticipate the concerns and objections of preservation-minded individuals and entities with decision-making power over approvals for adaptive reuse, expansion and new construction multi-family/mixed-use projects in historic areas.
2. Evaluate an innovative design concept to determine its assertible value for the proposed site and surrounding community, and its sensitivity to historic and architectural context.
3. Illustrate a narrative for the project that draws the attention of the stakeholder audience and decision-making authorities to the proposed benefits, and how it aligns with the community’s shared values, while alleviating anticipated concerns and heading off potential objections.
4. Design presentations that effectively steer the audience through the narrative, while responding authoritatively to questions and unexpected objects with sensitivity and application.

12:30pm-2:00pm Education Sessions

NOV3522 Hiring, Retaining and Developing the Next Generation of Firm Leaders

Jarvis Cook, Associate & Talent Acquisition Manager, Perkins Eastman

Trevor Harrison, Managing Principal, HBT Architects

Ian Smith, AIA, Principal, Ian Smith Design Group

Peter Margittai, AIA, Principal, Margittai Architects

NJ architect

Do you struggle with how to hire, retain and develop your staff? This session is packed with useful information provided by a panel of small firm architects who will share the development and implementation of an employee review process, how the HR landscape has changed, how to create a company vision, culture fit, the hiring process, retention, leadership training and more.

Learning Objectives

- 1.
- 2.
- 3.
- 4.

NOV3622 Streamlining the Small Firm Workflow Process

Nate Rozzi, AIA, Principal, Rozzi Architects

Michael Anderson, AIA, Owner, Abstract Architects

Seth Amman, AIA, AIA, Principal and Founder, Arch&Type

Ian Toner, AIA, Principal, Toner Architects

Mark Sullivan, AIA, Partner, JZA+D

Alyse Makarewicz, AIA, President, AMB Architects & AIA Texas SFX Representative

As a small firm, what does it take to tackle a project from concept to completion, and what are your system's strengths and weaknesses? As new technologies and best practices emerge each day, the job of streamlining internal operations in AE is never fully complete. Listen to a panel of architects present a case study that illustrates how small firms can use workflow software to promote productivity and efficiency across an entire project lifecycle to increase ROI.

Learning Objectives

1. Analyze and understand when a new or streamlined solution could benefit your firm
2. Describe the various hardware and software tools being used in small firms today
3. Discuss reasons to consider deploying certain tech stacks, such as ROI or other determining factors
4. Compare and contrast the advantages and disadvantages of various systems
5. Apply the processes used by peers to select the most effective tech solutions

Thursday, November 10

8:00am-9:00am Education Station Presentation(s)

9:05am-10:10am Keynote Presentation

NOV10KN222 OUTSPOKEN: Owing Your Mic Drop Moment

Courtney Stanley

Do you wish you spoke up more during meetings, in boardrooms, at networking events or even in your annual review? Do you wish you had the courage to outwardly disagree with others? Do you want to feel seen and heard?

So many people leave jobs, relationships, business ventures, and conversations feeling that if they had offered feedback, shared their ideas or verbalized their value, they would have achieved more. The truth is... they're right!

This keynote will empower you to get curious about what holds you back from speaking up, teach you how to build confidence in uncomfortable moments, create a culture of positive outspokenness, and understand the power of owning your story, your voice, and your opportunity to **change the game**.

Learning Objectives

1. Examine how falling victim to imposter syndrome and other obstacles translates to less opportunity, happiness, and success
2. Identify life-changing verbal and nonverbal strategies to communicate with confidence and impact
3. Discover the methodology to connect with others more authentically, powerfully and profitably
4. Explain how to transform moments of fear into opportunities of growth and change

10:15am-11:45am Education Sessions

NOV10122 Embracing Change: Adopting Passive House Design Principles at a Small Firm

Jordan Parnass, AIA, Principal, Circular

What happens when a small firm decides to go all-in on Passive House design principals? High performance design is not only the future but is completely achievable today for projects of all scales and typologies in all climate zones.

Learn how one firm was able to leverage staff training and changes to their design philosophy to gain access to a variety of different clients and project types. Your firm should embrace the opportunities presented by sustainable design and not see ever-tightening energy code requirements as an obstacle to practice. This presentation will describe the challenges and benefits of embracing Passive House design for projects.

Learning Objectives

1. Examine the necessary steps required to obtain certification as a Passive House design professional.
2. Identify typical strategies for increasing energy performance of a range of building types.
3. Explore steps that need to be taken to incorporate Passive House Design principals into their office workflow.
4. Discuss the quantifiable benefits for clients to adopt Passive House goals for their building projects.

NOV10222 Disruptive Small Firm Practices: Innovative Modules for Expanding Services

Marc Manack, AIA, Principal, SILO AR+D

Chris Baribeau, AIA, Principal, Modus Studio

Jonathan Jackson, Partner, WSDIA (WeShouldDoItAll)

Robert Maschke, FAIA, Founding Principal, Robert Maschke Architects

Explore innovative ideas for expanding a small firm's services beyond the traditional scope of services. A disruptive innovation helps create a new market and value network. In this course, three professionals will demonstrate how firms can utilize these innovations to expand into more sustainable and resilient business

models beyond traditional architecture, apply tools to re-conceptualize your firm's expanded service offerings and determine how expanded service integrate with current business models.

The course will end with a brainstorming session, giving participants energy and ideas for innovative ways to start your own disruptive practice.

Learning Objectives

1. Determine how expanded services integrate with their current business models.
2. Develop strategies for how to market expanded services to new and existing architectural clients.
3. Consider how expanded services augment opportunities for traditional architectural services offerings.
4. Examine case studies from three accomplished professionals who have successfully implemented innovative expanded services business models.

NOV10322 Shifting from Reactive to Proactive Marketing

Katie Alessi, Marketing Director & Founder, Trifecta Collaborative

Kelly Donahue, Communications Director & Founder, Trifecta Collaborative

If you are like many firms in our industry, most of your marketing activities can be summarized in one word – REACTIVE. RFP, proposal, interview – rinse and repeat. It can be a vicious cycle. You might think this is how it is supposed to be and that not pursuing every opportunity available can actually be a detriment to your business. But that doesn't have to be the case!

Participants will be introduced to a new way of approaching your marketing efforts during this interactive session. You will discover proven strategies and tips for moving the needle from being a REACTIVE firm to a PROACTIVE powerhouse. Additionally, you will explore tactics for fully leveraging your marketing, promotions, and business development activities. You will leave armed with ideas for enabling your firm to allocate the right resources to support new behaviors that ultimately serve the growth of your practice and get you noticed and recognized in the region and industry.

This session brings various perspectives to this topic: a veteran industry marketer and communications professional with large and small firm experience and success.

Learning Objectives

1. Analyze your current balance of reactive vs. proactive marketing tactics and learn how to implement strategies that the most successful architectural firms use to target and successfully win new work proactively.
2. Discover ways to develop and execute original, targeted marketing activities that make your firm stand out and become memorable to current clients, potential clients, and the community.
3. Identify and incorporate promotional tools and techniques to best market and showcase your services and expertise, increase your business development pipeline, and win work.
4. Implement a strategic approach to integrating marketing, business development, and promotions, enabling your firm to allocate resources to support activities that serve the practice's growth.

11:45am-12:15pm Lunch Break

12:20pm-1:50pm Education Sessions

NOV10422 Firm Roundtable: Rising Strategies for Practice Innovation

Stacy Keller, AIA, Senior Project Manager, InSite Consulting Architects

Mike Elliott, AIA, Architect/Lead Designer, Kluber Inc.

Amy Slattery, AIA, Founder & CEO, Odimo LLC

Brad Lukanic, AIA, CEO, Cannon Design

Are you a firm leader looking to connect with peers? Pair up with colleagues for this roundtable discussion on business models. An experienced facilitator will take you through topics including how the profession is creating alternative services, innovative delivery systems, and technology utilization, and managing the

talent pool. You'll also debate how the profession is leveraging the risk/reward relationships and customary legal structure. This enlightening practicum is intended to provide thoughtful considerations and connections.

Learning Objectives

1. Identify alternative services and innovative delivery systems with consideration for how their application to practice will affect the future of the profession.
2. Appraise forward-thinking strategic goals, services, emerging technologies, and talent management for the practice of the future.
3. Examine how to assess risk associated with alternative services and delivery models and their impact on the standards of care.
4. Discuss how to integrate new services and innovative thinking into your firm's business models.

NOV10522 Lessons Learned for Small Firms that Want to Become Bigger Firms

Daniel Heuberger, AIA, Principal, Dattner Architects

Dattner Architects' journey from a small, sole practitioner office to a 125 person partnership offers some lessons learned about how to cope with change, but actually embrace it as an integral part of practice. While we are no longer a small firm, we continue to refer to our roots in small practice and constantly reflect about what we learned along the way.

The demands on small firms are enormous compared to their resources and can be challenging for the traditional sole practitioner or small-scale partnership model. The competition for talent and experienced staff is significant; capital costs continually rise with the increasing sophistication of software and hardware, and as the regulatory environment and construction practices evolve, the potential risks to architects evolve and increase. Our presentation will use our own experience to describe how small firms can thrive and grow in an environment where the pace of change accelerates from year to year. It will focus on three aspects of our transition from small to larger firm:

1. How we navigated the line between innovation and early adoption and minimizing our risk with expensive new technologies and software and how we to integrate those technologies with professional practice.
2. How we look at transition as a permanent condition not just a set of actions. We will share our experience changing from a sole practitioner office to a third generation of partners.
3. Learn strategies for diversification. Diversity of work is good for all firms, but difficult for smaller firms to manage. Our diversification between public and private work and a variety of sectors has carried us through several economic cycles. We will focus on our early management of project diversity and opportunities at small scale which subsequently permitted our firm to grow and thrive as a larger firm.

Learning Objectives

1. Plan for leadership transition by identifying potential leaders and establishing a realistic time frame for transition.
2. Evaluate the critical differences and overlaps between leadership transition and ownership transition, and how they might each benefit your firm.
3. Develop a framework for adapting to technology driven change through manageable and urgent planning.
4. Explore diversifying your firm's portfolio and sources of revenue, despite having a limited staff and budget of a small firm.

NOV10622 Maintaining Design Integrity with Data-Driven Decision Making

Patrick Chopson, AIA, Chief Product Manager, cove.tool

The AEC industry remains a major sector accounting for nearly 40% of the carbon emissions. Jurisdictions globally are confronting climate change and recognizing that building decarbonization is an important component in their efforts. As a result, the efficiency requirements have tightened aggressively over the last 3 years with multiple countries, states, and cities adopting a net zero energy code. Achieving these targets require efficient collaboration between the architects, engineers, other team members and quickly accessible, accurate data to drive design decisions.

The AEC software market is highly fragmented. Solutions are typically designed for a specific task or user and not optimized for the pace of the project, posing a challenge to collaboration and communication across disciplines. This causes unexpected costs and delays that make it difficult for firms to make every project high-performing and sustainable.

This session will showcase how data-driven design and technology can facilitate teamwork and maintain a project's integrity. Building performance platforms can be leveraged to automate and centralize all the different building simulations and analyses run through different design phases like energy, daylighting, water, carbon, cost, and load modeling. Using automation for codes, finding sustainable solutions balancing cost and data, along with easy collaboration can help speed up the design workflow and benefit the project budget. Various business benefits of adopting sustainability in the design workflow will also be discussed. It will help them reach par with average and large-scale firms and get at the top of their game with high quality data and reports backing their designs.

Larger scale firms can achieve the new energy targets and emerging challenges by adopting multiple expensive software, and hiring specialists for various analyses like daylight, carbon, energy. While the former can afford such amenities and quickly adapt to these, smaller firms are often struggling to even consider adding another complexity and investment to their design workflow. This session will provide insights into the current challenges, benefits of adopting sustainability in the design workflow and majorly introduce data-driven design and automation as a solution to grow businesses. Learning more about user-friendly building performance technology, and removing the requirement to buy multiple software, will enable small firms to integrate sustainability into their projects. It will bring them up to par with large-scale firms and get at the top of their game with high-quality data and reports backing their designs.

Learning Objectives

1. Identify the typical challenges which prevent adoption of internal sustainability approaches.
2. Examine the business benefits of adopting technology and sustainability early in the workflow process.
3. Explain how to use data driven to balance sustainability and cost.
4. Illustrate how to integrate the new technologies to win more projects and stay ahead of the conversation.