

**April 2010**

A Quarterly Publication

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## **The Southern Arizona Chapter**

Founded July 1996  
**Tucson, Arizona**  
[www.sacsda.com](http://www.sacsda.com)

### **Professional Emphasis Groups (PEGs)**

- FIN** – Finance
- HR** – Human Resources
- IT** – Information Technology
- MKT** – Marketing
- OA** – Office Administration
- PM** – Project Administration

## *Tracking Projects with Earned Value Analysis*

by Brian Siefkes

You may have heard in various classes or webinars you've attended that Earned Value Analysis (EVA) is a great way to track and manage your projects. It's one of the many tools that industry experts tell you can boost your project's profitability. But if EVA is that beneficial, why do so few firms actually use it? One common reason for its low usage is the difficulty in getting the right data presented in a useful manner. With today's accounting and project management software, those issues are quickly becoming a thing of the past.

When we talk about EVA in the Professional Services industry, we're talking about the relationship between a project's contract amount, spent (earned or burn rate) amount, and the project's reported percent complete (RPC). When you compare these three items against your estimated project timeline, you start to paint a vivid picture of where your project stands. The EVA data is most commonly displayed using a three line graph (see example on page 5). For a project manager or principal, this graph can be a valuable tool for quickly determining if a project is on time and on budget.

The best part about Earned Value Analysis is if you're using an accounting and project management system then you probably have all of the necessary data - it just happens to be in various places. In any A/E project management and accounting software, before you ever start work on a job, you should enter your contract amounts, and budget the project down to the phase level. Once your contract is set and your project is active, you begin capturing your time and expenses, spent amount. The final piece of the EVA puzzle is the one that is used the least: Reported Percent Complete at the phase level. Not all software programs are built to capture the RPC so some firms will

track it outside of their project management system if they track it at all. RPC is a critical piece of EVA. It should come directly from the Project Manager and be updated at least once a week or as predetermined milestones are met. If you have all of these elements, then you have everything you need to create an Earned Value Analysis graph. [See graph example on page five.]

In a perfect world as your project nears completion, you would see your contract, spent, and RPC values all follow the same path. The reality is that projects will change and evolve while you're working on them, which can make tracking and management difficult if not impossible. This is where the EVA graphs are most useful. You can compare your RPC vertically to your spent value to see where your project stands in terms of budget to actual. You can gauge whether or not your project is on schedule by comparing your RPC horizontally to your contract amount. When you analyze your EVA at the project or phase level, you can easily take the guesswork out of determining your overall project status.

While most firms have all of the EVA data available, the difficulty comes in putting the graphs together and updating them

(Continued on page 5)

Society for Design Administration  
An Affiliate of the  
American Institute of Architects

*Mission Statement:*  
To promote the exchange of ideas and  
educate its members in the related  
disciplines of design firm administration.

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# President's Letter

## Springtime in Tucson!

It's hard to believe that we're already well into April! It seems that 2010 is going to come and go quickly. Maybe it's just because many of us are trying to accomplish more in less time and with less resources than in past years.

Although the Southern Arizona Chapter has experienced a decline in its membership numbers, we are hopeful that as our economy begins to recover we can welcome some additional members with new perspectives. It is important for all members to keep their eyes and ears open. If you know of someone or a local firm who could benefit from membership with our group, please pass the information along to our membership chair, Nancy Kollet.

Spring has sprung in Tucson! The beauty all around us as a result of the abundance of rain received during the winter months is quite breathtaking. It also reminds us that we are entering a very busy time of year for SACSDA.

I'm excited to report that five members of our chapter have plans to attend EDSymposium10 in Las Vegas, May 18<sup>th</sup> to the 22<sup>nd</sup>. It appears that the EdSymposium10 Committee, ExCom and

SDA National have planned an exciting event full of leadership training, educational programs, and social events to get to know fellow SDA members from around the country and Canada. If you have never had the opportunity to attend a National event, I highly encourage you to seek out the opportunity.

Volleyball fever is about to hit the Old Pueblo. The 14<sup>th</sup> Annual SACSDA Volleyball Tournament will be held at Morris K. Udall Park on Friday, June 4, 2010. This is always such a great event;



full of fun times, opportunities for friendly competition among competitors in the industry, and serves as a major fundraising activity for our chapter. If your firm is interested in entering a team in the competition, please visit the volleyball page on our website at [www.sacsda.com](http://www.sacsda.com) or contact Erin Castner.

I thank you for your support as we move through 2010. If you

have any comments or questions about any of our chapter activities, I encourage you to attend our monthly business meetings or to contact me personally. I look forward to the rest of 2010 and all it has to offer. Until then, enjoy the beautiful Tucson spring!

**Tami Griffin, CDFA**  
SACSDA 2010 President

## Mark Your Calendar

May		June		July	
13	<b>Board Meeting</b> 7:30 am at Herschman Architects	4	<b>14<sup>th</sup> Annual Volleyball Tournament</b>	8	<b>Board Meeting</b> 7:30 am at Herschman Architects
18 to 22	<b>EDS 10 in Vegas</b>	10	<b>Board Meeting</b> 7:30 am at Herschman Architects	27	<b>Luncheon</b> 12:00 noon-1:30 pm Viscount Suite Hotel 4855 E. Broadway
25	<b>Luncheon</b> 12:00 noon-1:30 pm Viscount Suite Hotel 4855 E. Broadway	22	<b>Luncheon</b> 12:00 noon-1:30 pm Viscount Suite Hotel 4855 E. Broadway		

# SAC/SDA Chapter News

## 1<sup>st</sup> Quarter 2010 Monthly Meeting Recap

**Jan 26** – Janet Summers, Tina Adams, and Ed Rubacha from Van Rylin Associates, Inc., presented an interesting program on Lien Law In Arizona. Everyone learned something useful regarding liens and liability, even when it comes to hiring someone to remodel your home.

**Feb 23** – Managing your Biggest Assets: Accounts Receivables was presented by Richard Adams, NACM Southwest Credit. He offered tips on motivating clients to pay on time, methods to get outstanding invoices paid sooner, making the best use of your time to make the most money for your firm, and options to outsource collections when necessary.

**March 23** – Government Practices; How to do Business with a Government Entity presented by Cherie Odeski from the City of Tucson and Terri Spencer from Pima County. See page 4 for more details and a complete meeting summary.

## Upcoming 2010 Event Reminders

### 14th Annual Volleyball Tournament

Friday, June 5<sup>th</sup>, 2010

See page 5 for complete details

### Sustainability Seminar

Thursday, September 16, 2010

7:30 am to 1:30 pm

Windmill Suites - Details TBA

### Kidstruction:

This event is a design/build competition among middle school students sponsored by the SACSDA as part of Architecture Week. Press releases will be sent to local middle schools who might be interested in participating this year. We're still looking for business card donations and volunteers. Contact Nancy Tom for more info.

To join the Southern Arizona Chapter of SDA, contact Nancy Kollet (Membership) at 520-795-4000 or [nancysda@yahoo.com](mailto:nancysda@yahoo.com), or visit the SDA National website: <http://www.sdadmin.org>.

## SDA National News & Events

### Webinar Schedule

**May 13** at 1pm EDT HR Trends: Positioning Your Organization for Future Growth and Recovery

**June 3** at 1pm EDT SDA Member Benefits: What's in it for YOU?

Dates TBA Soon for:

- Improving Your Website
- AIA's New CES Online System & New Provider Manual
- Masterworks Plug-In to Edit MasterSpec
- Why Finance is Important
- AIA Contract Documents Software
- AND MORE!

### Books to Add to Your Reading List

**"The First 90 Days"** by M. Watkins reviews the ten-step road map to help you in a transition of moving up or laterally on the career food chain. The road map has practical and instantly applicable advice summed up in directives like: promote yourself, create coalitions, and secure early wins.

**"Lead Your Boss: The Subtle Art of Managing Up"** by J. Baldoni offers a fine plan for delivering what your boss and team needs.

**"From Difficult to Disturbed"** by Laurence Miller uses case studies to teach how to handle employees with common disorders like passive-aggressive and avoidant personalities. It explains the problems associated with each disorder and how to communicate with them.

# SAAEMA & SDA Joint Meeting Summary

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Our March program was held in conjunction with SAAEMA members and covered government practices. The program entitled “How to do Business with a Government Entity” was presented by Terri Spencer from Pima County and by Cherie Odeski from the City of Tucson. One quote from after the meeting...“I learned a lot today. I didn’t know I could volunteer to sit in as a nonvoting selection committee member.”

Terri’s presentation summarized the Qualifications-Based Selection (QBS) process. She also discussed the debrief process which includes evaluation tabulation sheets and evaluator comments and may include strengths, weaknesses, and deficiencies. She discussed the Qualified Consultants List (QCL) Program which has no pre-submittal meeting nor any interviews. Terri concluded her presentation by offering the meeting participants a chance to sit on a County evaluation panel. Be sure to read Terri’s article entitled “When it’s all said and done: Making your debrief count” in the SAAEMA quarterly newsletter, July 2009 Issue 2.

Cherie’s presentation focused on discussing the City’s contracted services including Architect and Engineer Services, Design Bid Build (DBB) construction, and Alternative Project Delivery Methods (APDMs). She reviewed the RFQ process and discussed preference points for certified S/M/WBE firms and how our firms can be notified by the City of Tucson. Cherie also discussed the difference between a one step and two step process.

SDA would like to take this time to acknowledge the time and commitment that Cherie and Terri took to enlighten us with this program. We hope to invite them both back as guests and perhaps as future speakers. And thank you to SAAEMA members for joining us!

## Thank You!



## Member Spotlight

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Lori Rosado has many years of experience in the A/E/C industry prior to joining Schneider & Associates as an Office Manager last summer. She has worked in the past for The Architecture Company, Paragon Architects, Saylor-Brown Bolduc Lara Architects (SBBL), Southwest, and Gromatzky Dupree and Associates. Lori earned her A.S. Degree in Secretarial Science from Culver-Stockton College in Canton, Missouri.



She knew absolutely nothing about architecture or construction when she started in the A/E/C industry. Lori states, “I have grown to love it and appreciate looking at buildings, houses, etc., with an eye toward what it took to get them built.” Lori is not the type of person to shy away from change. She has lived in multiple states including Arizona, California, New Mexico, Missouri, Oklahoma, Illinois; and even England. About California, Lori says, “being around the military in San Diego got me in the mood to join, but I had always wanted to go into the Air Force, not the Navy. So I did.” She spent four years in the military and was a com/nav specialist (worked on radios and radar in helicopters and airplanes and repaired them in the shop). Lori’s last

station was in Albuquerque and she moved to Tucson in 1991 after being honorably discharged from the U.S. Air Force. Lori is happy with the experience she had in the Air Force and is proud to say, “I could have done admin work in the military, but I chose to do something completely out of my comfort zone.”

Lori believes she is fortunate to be a SAC/SDA member. She says, “through SDA, I have acquired knowledge about information that fit into our PEG’s that I would not normally have been exposed to. Being an office manager with more

of a finance background, this has given me experience/information in the other areas of my position that I would not normally have been able to acquire (i.e., human resources, marketing, etc.). Through the friendships I have developed as a result of membership in SDA, I have a network of like-minded individuals to network with that enhances my position and my knowledge base.”

Lori is a proud mother of two; daughter Rian (20) and son Blair (16).



**THE AMERICAN INSTITUTE OF ARCHITECTS**

## Upcoming AIA SAC Events

**April 22 - 4:30 pm**

ExCom Meeting at AIASAC Conference Room

**May 12**

Chapter Meeting

**May 25 - 4:30 pm**

ExCom Meeting at AIASAC Conference Room

**June 10-13**

AIA National Convention in Miami

**June 28 - 4:30 pm**

ExCom Meeting at AIASAC Conference Room

**Oct 15**

BIG Cornerstone Golf Tournament

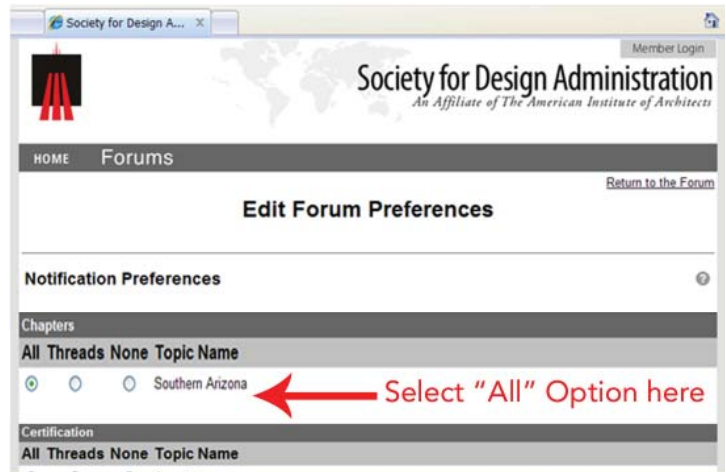
**Sept 25 to Oct 3**

Architecture Week

# Online Forum

Have you set up your profile preferences for the SDA Forum? **Did you specifically request the Southern Arizona Chapter link?**

Are you missing out on information being distributed chapter-wide? All chapter members should now be using the forum to distribute information to our group. Please contact Tami if you have any questions. Thanks!

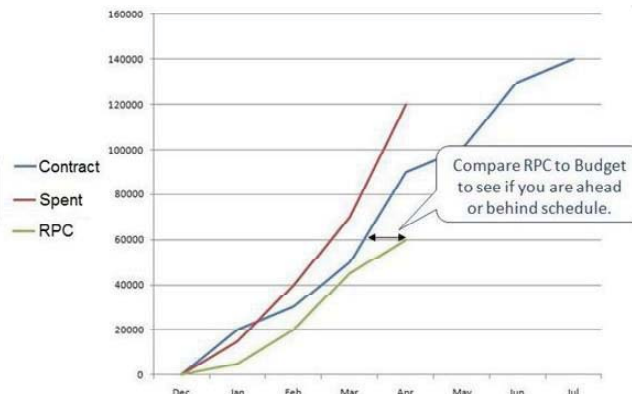
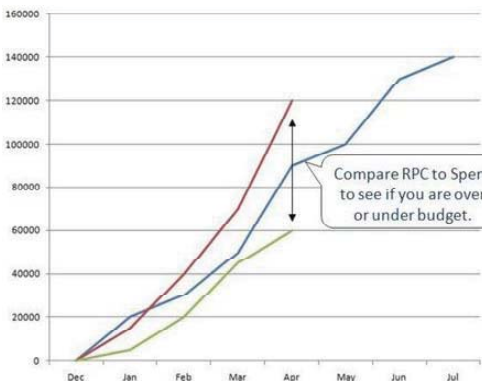


## Tracking Projects with Earned Value Analysis (Continued from page 1)

regularly. If you are using an older or generic accounting system, then you will most likely have to create the EVA graphs using Microsoft Excel. If that's the case, then you will also need to create a process for manually entering the spent and RPC values and timelines as they change. That tends to be more work than an administrative staff wants to take on, especially if they are already stretched thin, thanks to downsizing. To help save that time and effort, PSMJ offers Plantrax®, a system that integrates your accounting software with Excel to create EVA graphs. A more integrated solution is Axiom's PORTFOLIO, which offers a built-in progress report that gives you real-time, up-to-date Earned Value Analysis at the project and phase level - with the click of a mouse.

In today's economy, the firms that are surviving are the firms that can track and manage their projects with maximum efficiency. Gone are the days of too many jobs and not enough staff, so leaking money away on your projects will surely drown your business. Successfully using Earned Value Analysis can help plug those holes and identify small problems before they become major headaches.

Written by:  
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# Firm Profile

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Schneider & Associates Structural Engineers, Inc. has been in Tucson for 10 years and provides the design and building industry a creative alternative in structural engineering services. The firm's combined expertise enables them the unique ability

to offer excellent service to a diverse clientele. Their thorough understanding of the A/E and construction professions allows them to collaborate with the entire design/construction team to ensure that projects meet time and budget constraints. They always consider the constructability and cost of the structure, while maintaining its integrity and aesthetic character. Schneider & Associates is a fully-staffed firm, including structural engineers, designers, and computer-aided drafting operators. The professional staff of Schneider & Associates is committed to excellence and achieving a high standard of quality by focusing on the specific needs of the client and the specific requirements of the project. Quality control procedures are implemented for every project to ensure that the steady flow of information is maintained to the design team and owner for project success. Schneider & Associates has worked on many



*Westside Police Station, Tucson, Arizona  
A 128,268-sf steel column, steel framed renovation of existing building and added a steel framed auditorium designed by Schneider & Associates*

design/build projects of various sizes. Their understanding in this design relationship provides their team the experience required to make this process successful. Schneider & Associates has demonstrated both structural engineering creativity and efficiency on hundreds of projects all over the country. Their staff is very conscientious in sustainable design as it applies to structural components. Their project experience provides the team with a thorough understanding and awareness of the entire teams' design needs. Their designers have identified and provided design solutions for vibration concerns, seismic restraint of special equipment, isolated foundations, and loads and efficient design of buildings.



## Main Store & Offices:

(near the U of A)

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## Northwest

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## Eastside

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# EdSymposium 2010 Overview

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## **National Convention - EDSymposium May 18-22, 2010 in Las Vegas**

### Conference Registration

Conference registration is available online and by paper form. Visit the EDSymposium10 homepage on the SDA website to access the registration forms. Registration will not be processed without payment.

### Sessions

This year's annual conference will offer over 15 educational sessions designed to meet a wide array of experience and knowledge. The sessions are categorized and color-coded to help you identify the Professional Emphasis Groups:

- Finance
- Human Resources
- Marketing
- Office Administration
- Project Administration
- Informational Technology

### Exhibitor Tables

Please be sure to stop and visit all of the exhibitors at the conference. This is the best place to meet and visit with various vendors in the industry. You will gain firsthand experience of all the new products, technology, and innovative tools available for managing today's A/E/C firms. Take advantage of this opportunity to meet with representatives face-to-face, ask your questions, and take information back to your firm.

### SACSDA Lunch at EDSymposium10

Lunch is "On Your Own" on Wednesday and Friday; perhaps all of the SACSDA attendees could have lunch together one of those days. Let Christine know if you are interested.

### Certified Design Firm Administrator

If you have been thinking about obtaining your CDFA designation, complete the application and make plans to sit for the examination. Become a member of an elite group of firm administrators. All CDFA materials are available on the SDA website: [www.sdadmin.org](http://www.sdadmin.org)

### Volunteers Needed!

The SDA needs volunteers for EDSymposium10. There are several positions that need to be filled with members who are attending EDSymposium10 in May. See the SDA website for more information.

### SDA has gone GREEN

The SDA is doing its part in order to make a difference and be more earth friendly! The SDA is taking action by:

- Going paperless- all speaker handouts will be available electronically and can be downloaded prior to the conference by going to the EDSymposium10 homepage.
- Recycling plastic bottles and cans during lunch and scheduled breaks.
- Requesting that the hotel not pass out note pads to attendees prior to the sessions.
- Instructions for downloading speaker handouts will be provided by May 10, 2010.

Need more information? Find the entire 16 page brochure online at [www.sdadmin.org](http://www.sdadmin.org).





# 14<sup>th</sup> Annual SDA Volleyball Tournament!!!

Spectators and cheerleaders are welcome!!!

**WHEN:**

Friday, June 4, 2010

**WHERE:**

Morris K. Udall Park  
 7200 E. Tanque Verde Rd.

**TIME:**

Sign in and dinner begin at 5 pm  
 Tournament play starts at 6 pm

**QUESTIONS?**

Erin Castner, Reproductions Inc.  
 at (520) 622-7747 or  
 ecastner@reproductionsinc.com

Now in its 14<sup>th</sup> year, this event raises scholarship funds for chapter members to attend educational seminars, leadership conferences, and the annual SDA National Convention (EDSymposium). Teams represent local engineering and architecture firms along with other industry-related businesses and sponsors.

Team spirit and good sportsmanship highlight the day's fun while supporting the Southern Arizona Chapter of SDA.



**Teams are still forming - Call Now!**