The EntreArchitect™ Community
ANNUAL MEETING
The International Conference for Small Firm Entrepreneur Architects
Austin, Texas · November 1-3, 2022
With support from Monograph

BUILDXACT

Thank you for breakfast.

Welcome to Day 1

Thank you for your support as Title Sponsor.

Welcome to Session 1

Thank you for supporting Session 1.

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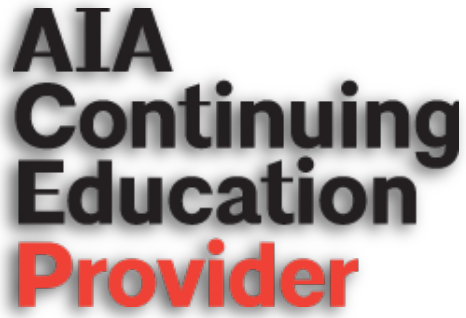
AIA CES Provider Statement



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Creating BOLD Possibilities

Empowering Leaders to Build BOLD Firms

A presentation for The EntreArchitect Community Annual Meeting

By Bolanle Williams-Olley
CFO, Mancini Duffy & Author, Build Boldly

November 2, 2022

Why is it often difficult to transition from a **technical expert to leader?**

The Leader Transition Gap

Skills

Mindset

People/Team

We'll Discuss

How to BODLY lead yourself.

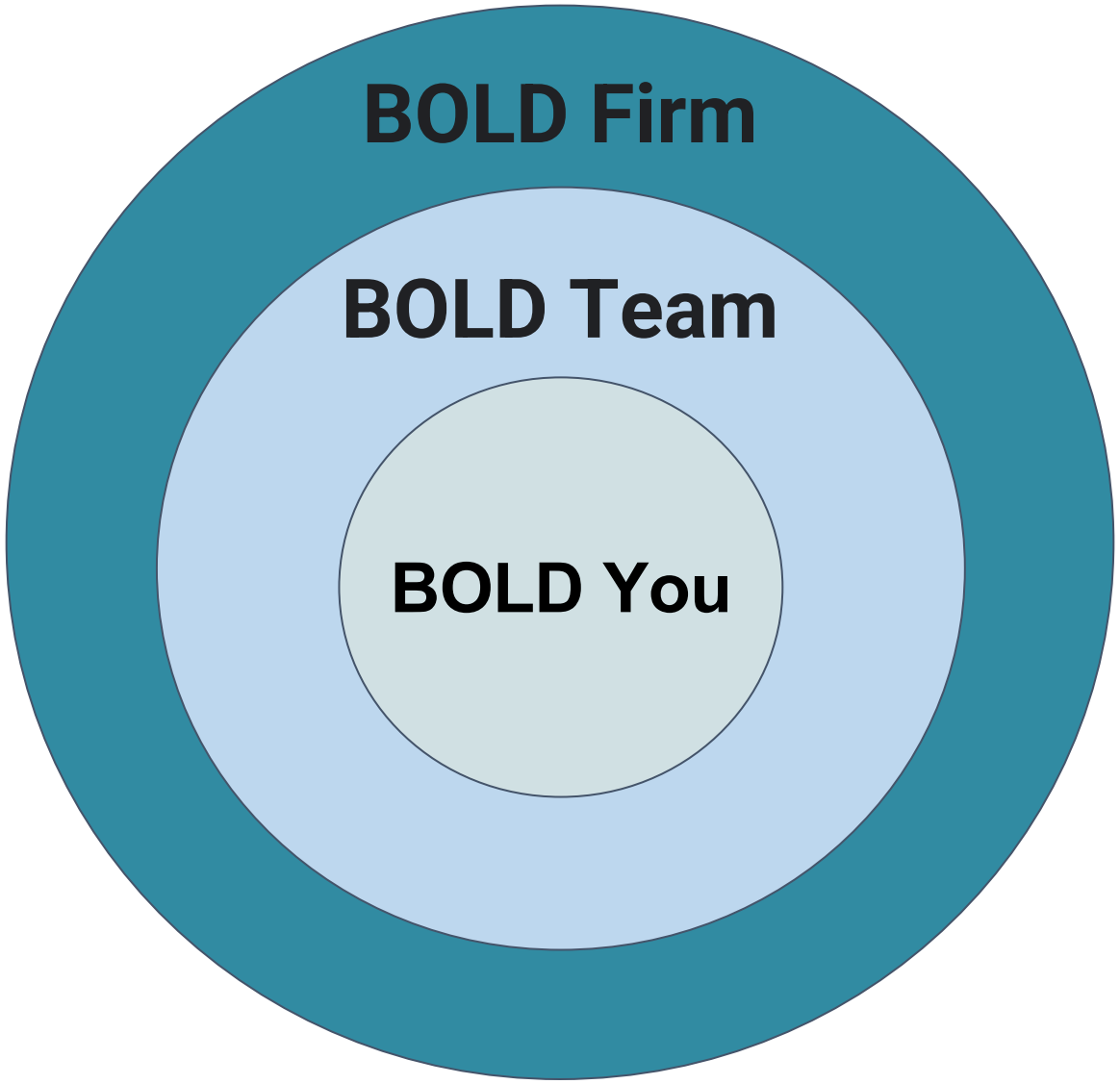
The B.O.L.D. Framework.

How to apply the BOLD framework to your People and Practice.

“Being **BOLD** is finding ways to create solutions and make an impact - not sometime in the future, but *now*.”

Bolanle Williams-Olley

61% of highly successful companies consider their business to operate boldly.


BOLD Firm
BOLD Team
BOLD You

TO BE A LEADER

you have to lead yourself first.

Debasish Mridha

Benefits of self-leadership

Discipline

Accountability

Curiosity

Honesty

Strengthen Relationships

How to lead yourself

It starts with your **mindset.**

Define your BOLD vision.

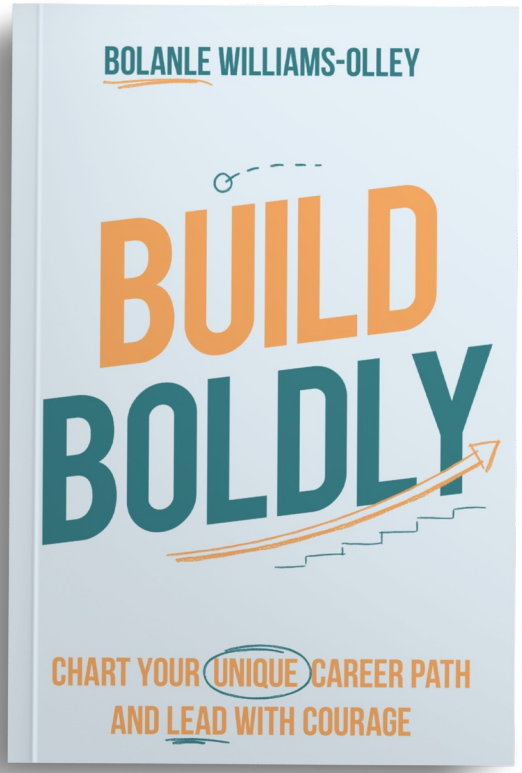
The B.O.L.D. Framework

Be yourself.

Open your mind to new definitions & opportunities.

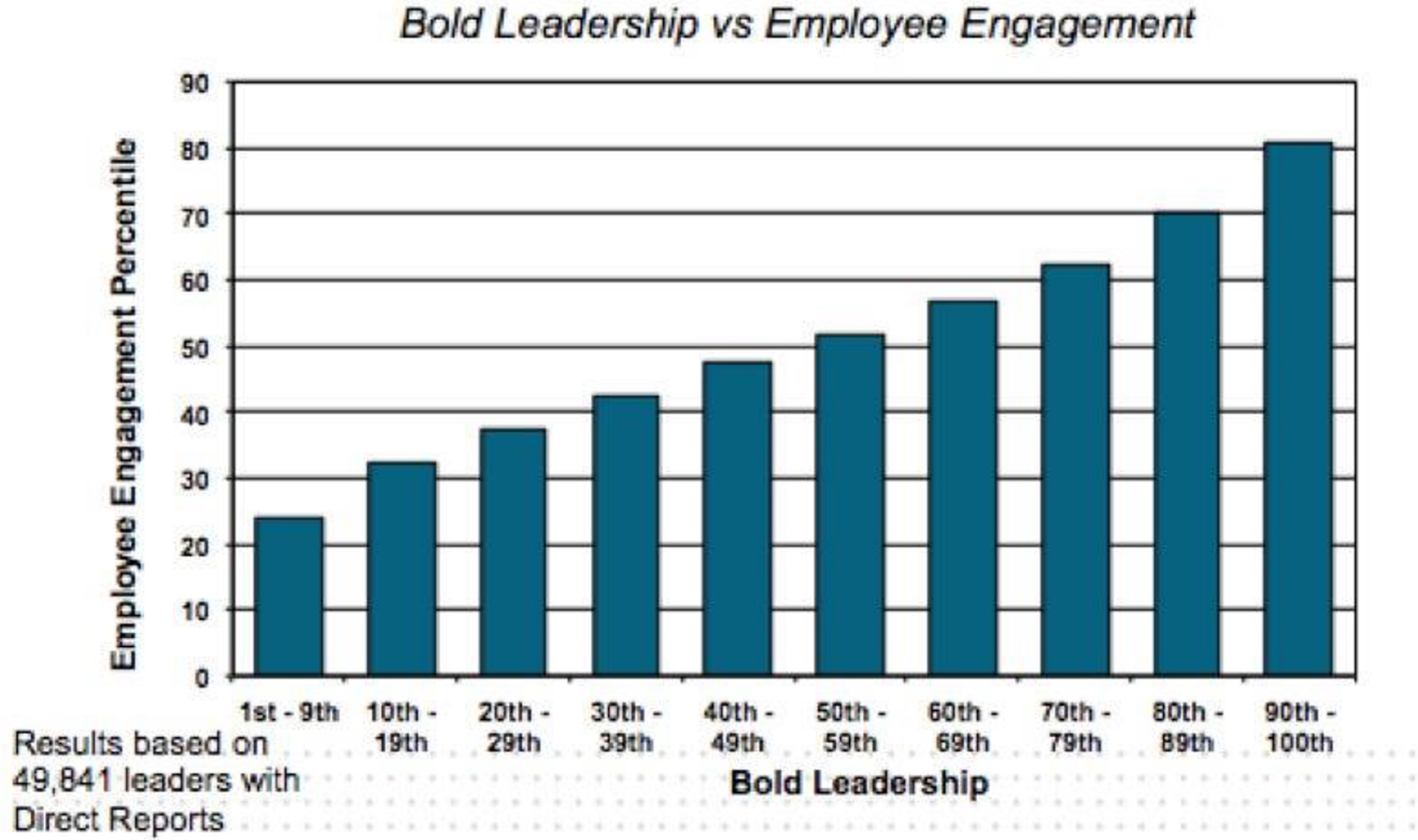
Lift Others.

Don’t wait - Do it now.



Build Boldly, chart your unique career path and lead with courage.

How does BOLD leadership impact your people and practice?



Results based on 49,841 leaders with Direct Reports

PEOPLE

Promote authenticity

Ownership mentality and invite innovation

Invest time and resources

Say YES to their ideas

PRACTICE

Define WHO you are.

Invite new ideas.

Build up talent.

Allow flexibility.

The B.O.L.D. Challenge

Am I creating a culture that …

- fosters boldness?
- is constantly evolving for the better?
- creates improved experiences?

What intentional choices will I make today?

Stay in Touch

Website: www.bolanlewo.com

Linkedin: www.linkedin.com/in/bolanlewo

Instagram: @bolanle_hq

***Build Boldly**, chart your unique career path and lead with courage.*

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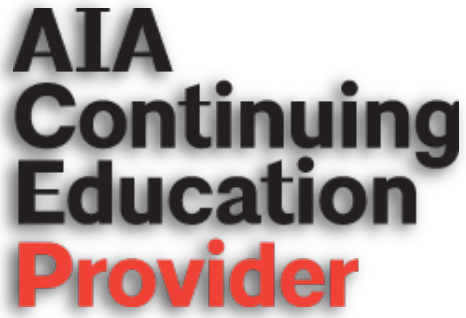

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Hiring with Heart
+
Growing a Team

HEART . CULTURE . GROWTH

DESIGN with
BUILD with
LEAD with

HEART

- What is the value of an architect? (What values do you bring to your clients?)

HEART

- What is the value of an architect? (What values do you bring to your clients?)
- What values do you wish for in your clients?

HEART

- What is the value of an architect? (What values do you bring to your clients?)
- What values do you wish for in your clients?
- What values do you seek in an employee?

HEART

- What is the value of an architect? (What values do you bring to your clients?)
- What values do you wish for in your clients?
- What values do you seek in an employee?
- What values do you seek in your colleagues/peers?

HEART

- What is the value of an architect? (What values do you bring to your clients?)
- What values do you wish for in your clients?
- What values do you seek in an employee?
- What values do you seek in your colleagues/peers?
- What values do your employees seek in a boss?

VALUE ME

KINDNESS
AUTHENTICITY x5
LOVE
HUMOR
BEAUTY
HAPPINESS
BALANCE x2
AUTONOMY
OPTIMISM
LOVE
GROWTH
CREATIVITY
COMMUNITY
WISDOM
OPENNESS

VALUES: COLLEAGUES

OPTIMISM
CONTRIBUTION
RESPECT
GROWTH
HONESTY
HUMOR
CURIOSITY
OPENNESS
KNOWLEDGE
SINCERITY
SELF-STARTER
DRIVE
EMPATHY
DETERMINATION
COMPASSION
COMMUNITY
CREATIVITY
TRUSTWORTHINESS
ADVENTURE
BALANCE
RESILIENCY
SECURITY
FRIENDSHIP
FUN
KINDNESS

VALUES: IN OUR CLIENTS

CURIOSITY
RESPECT
ADVENTURE
OPENNESS
STABILITY
ETHICAL
SINCERITY
CONTRIBUTION
WEALTH
PLEASURE
TRUST
KINDNESS
AMBITION
FAITH
HONESTY
FAIRNESS
FUN
POISE
CHALLENGE
REALISTIC
UNDERSTANDING

VALUES: CLIENTS SEEK IN US

KNOWLEDGE
CREATIVITY
EMPATHY
AUTHORITY
COMPETENCY
TRUSTWORTHINESS
COMPASSION
MEANINGFUL WORK
SINCERITY
ETHICAL
RESPONSIBILITY
OPENNESS
SERVICE
STABILITY
SECURITY
DETERMINATION
REPUTATION
ACHIEVEMENT
SUCCESS
HONESTY
POISE
FUN
BEAUTY
COMMUNITY
PLEASURE

HEART

What kind of person are we looking for?

What are they looking for in an architecture firm?

HEART

CULTURE

One of the reasons I believe we have a super strong team is we are open, honest, + aware about who we are and why, and we find people who want to be part of that.

CULTURE

Studio MM Off-Site
June 23 - 25, 2021
Location: Starlight Motel / TinkerBox, Kerhonkson, NY

Wednesday, June 23

4:00 PM: Meet at Starlite Motel 5938 US-209, Kerhonkson, NY 12446

5:30 PM: Leave Starlite

6:00 PM - 7:00 PM: ACTIVITY I: Future Views

7:00 PM: Leave for Dinner

7:30 PM: Dinner @ StoneHouse Tavern 4802 Route 209, Accord, NY 12404
After Dinner: Firepit + S'mores (+ wine) @ Starlite

Thursday, June 24

8:15 AM: Leave for TinkerBox GPS: 41°48'51.3"N 74°19'10.2"W
- Coffee + light breakfast @ Tink (Colbi made cold brew!!)

9:00 AM - 11:30 AM: SESSION I - FOCUS: ME
- 9:00 - 9:45 **A**
- 9:45 - 10:20 **B**
- 10:30 - 11:30 **C**

11:45 AM - 1:00 PM: LUNCH: Love Bird 4728 Route 209, Accord, NY, 12404

2:00 PM - 3:30 PM: ACTIVITY II: Design is in the (mini) Details (@Tink)
- Team Blue: HJ +++
- Team Green: BF +++
- Team Yellow: GK +++
- *3:10PM: Presentations*

3:45 PM - 5:00 PM: SESSION II - FOCUS: WE
- **A**
- **B**
- **C**
- **D**
- *4:15PM: "white board"*

CULTURE

FOCUS: ME

CULTURE

FOCUS: ME

- Write down one thing you are good at…
  - Personally
  - Professionally

CULTURE

FOCUS: ME

- Write down one thing you are good at…
  - Personally
  - Professionally

- Write down one thing you need to work on…
  - Personally
  - Professionally

CULTURE

FOCUS: ME

- Write down one thing you are good at…
  - Personally
  - Professionally
- Write down one thing you need to work on…
  - Personally
  - Professionally
- Write down one moment that made you the most proud in the last 3 months.

CULTURE

Culture isn’t a word we put in quotes and call on when we need to…

It is a true part of our firm; and I believe it is the most important part. It’s our core – our heart.

CULTURE

GROWTH

How do you carry that culture through your firm to create growth / retain good people / maintain strength?

GROWTH

Studio MM Off-Site
June 23 - 25, 2021
Location: Starlight Motel / TinkerBox, Kerhonkson, NY

5:15/5:30 PM: Head back to Starlite / Leave ~6:45PM for dinner

7:00 PM: Dinner @ Westwind Orchard 215 Lower Whitfield Road, Accord, NY 12404
After Dinner: Hangout @ Starlite (s'more S'mores?! ;))

Friday, June 25

8:15 AM: Leave for TinkerBox
- Coffee + light breakfast @ Tink (Colbi made cold brew!!)

9:00 AM- 10:30 AM: SESSION III: OPEN OFFICE
- Intro to Profitability + Case Study - TL presents
- "Business Development is everyone's job…"

10:45 AM: Leave for Afternoon Activities

11:45 PM - 1:00 PM: Lunch + Site Visit
- **BC Retreat** GPS: 42°05'52.9"N 74°02'06.8"W
- Lunch w Tim and Rich

1:00 PM - 2:20 PM: ACTIVITY III: Lead...
- One hour limit + 20 minutes

2:45 PM - 4:15 PM : ACTIVITY IV: Site Visits @ The Cliffs
- Kaat Cliffs
- Rebus
- Future build: Skyhaus

GPS: 231 Manorville Rd, Saugerties
Turn onto the dirt road (Greenidge Lane) when you see mailboxes for 232/ 233 Manorville Rd. Stay to the right when the road splits, you'll see a street sign for Aurora View Road.

TBD : Depart for NYC, etc.
(In case anyone wants a diversion on the way home…
Catskill Terraces site: GPS: 42°08'26.1"N 74°01'40.6"W)

GROWTH

GROWTH

DESIGN with

BUILD with

LEAD with

HEART . CULTURE . GROWTH

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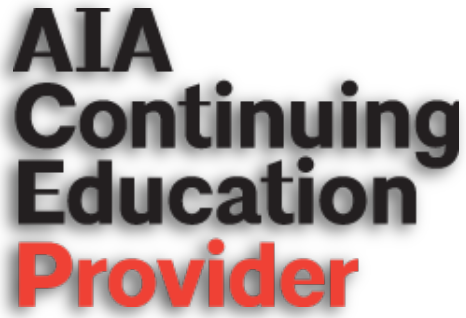

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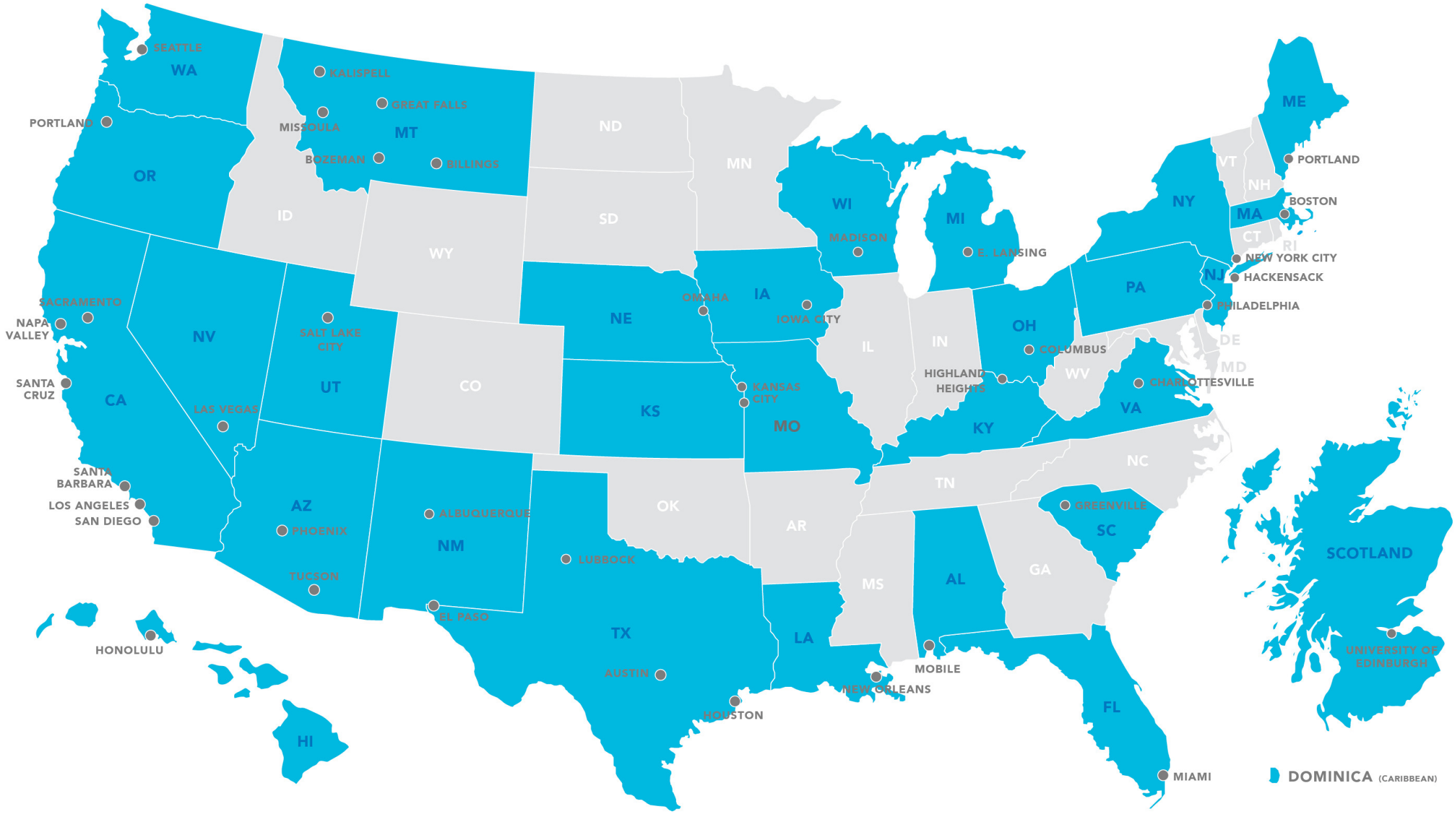
CO ARCHITECTS

Biomedical Sciences Partnership Building
University of Arizona, Phoenix

CO Architects Experience



55+ PROJECTS FOR SCHOOLS OF MEDICINE & THE HEALTH SCIENCES

13M SF SCIENCE & TECHNOLOGY PROGRAMS, PLANS, AND DESIGNS

5 PROJECTS SUPPORTING PSYCHOLOGY & PUBLIC HEALTH

8.4+ MILLION SF OF HEALTH SCIENCES & MED ED PROGRAMS, PLANS AND DESIGNS

35+ CMAR HIGHER EDUCATION PROJECTS

IN-HOUSE LABORATORY PLANNING / MEDICAL EDUCATION PLANNING

IN-HOUSE STRATEGIC TECHNOLOGY PLANNING EXPERIENCE

55%
WOMEN

53%
MINORITY
ETHNICITIES

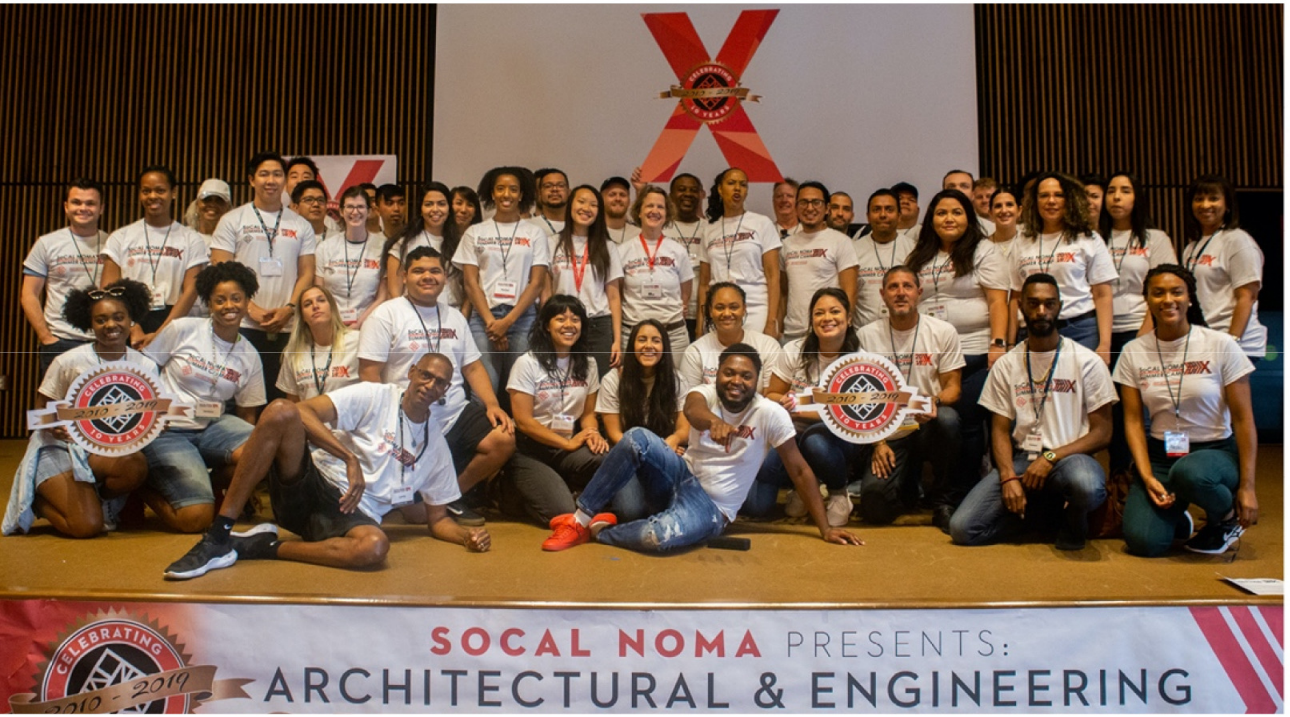
HAILING FROM
23
COUNTRIES

SPEAKING
18
LANGUAGES

ARCHITECTS

Diversity + Inclusion

SoCAL NOMA ARCHITECTURE & ENGINEERING SUMMER CAMP



2019

2020

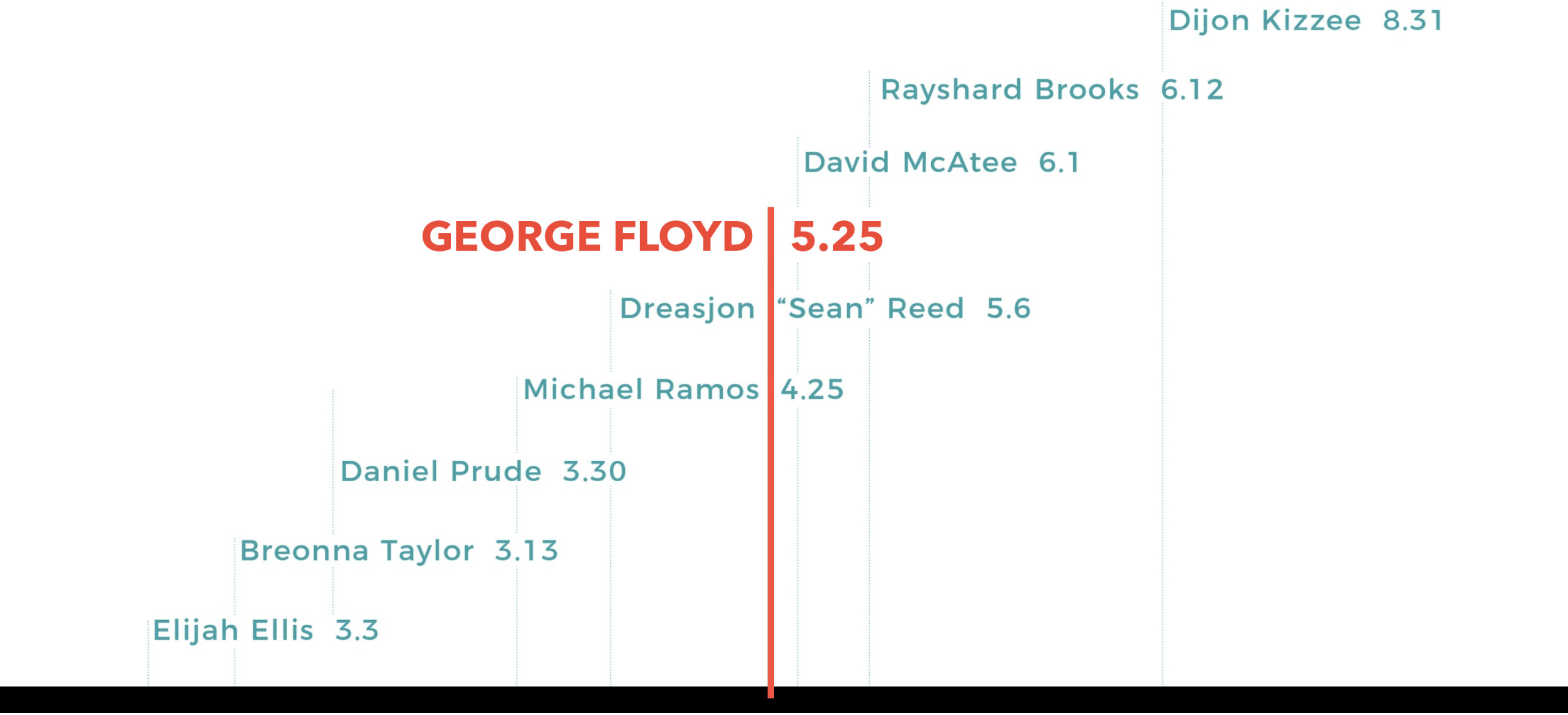
SoCAL NOMA JOB SHADOWING

SoCAL NOMA GENERAL BODY MEETING MAY 2019

HAMPTON UNIVERSITY CAREER FAIR 2020

CAN'T
BREATHE
I
BLACK
LIVES
MATTER

ONE OF MANY...


Dijon Kizzee 8.31
Rayshard Brooks 6.12
David McAtee 6.1
GEORGE FLOYD 5.25
Dreasjon "Sean" Reed 5.6
Michael Ramos 4.25
Daniel Prude 3.30
Breonna Taylor 3.13
Elijah Ellis 3.3

Dear COworkers:

It's been a tough few weeks and days, processing the fact that **another black person has fallen victim to racial injustice.** The senseless death of George Floyd and other black men and women before him, simply put...hurts. This could have been our brother, cousin, nephew or friend. What we keep grappling with is 8 minutes and 46 seconds. **8 minutes and 46 seconds.** That's how long we had to watch as George Floyd took his last breath on camera.

We're experiencing **great personal trauma.** We're angry, hurt and frustrated, yet every day this week, we've woken up and answered emails, gotten on Go-to-Meeting calls and met deadlines. We show up with a smile and put the pain and fear behind us, swallow the rage so we can do our job but it hasn't been easy.

What has helped, is those of you who've reached out to us, to see how we are doing. **Acknowledging the injustices and recognizing the difficulty** of having to work amongst people who aren't necessarily comfortable talking about what's going on. That there have been **demonstrations in at least 430 cities and towns across all 50 states, and internationally.** But most importantly that we can see that the architectural community is no longer silent on racial injustice, as we share posts amongst ourselves, from the AIA and the architectural community.

We know talking about racism is uncomfortable but **we have to be okay with being uncomfortable,** so that we can get to a solution. We need a solution. We have to get somewhere.

Thank you for caring,
Antoinette, Rachel and Jo.

Thank you Rachael and Jo for contributing to this letter. Also, we want to acknowledge our other black COworkers: Barron, Charles, Deborah, Dominique and Wyn who maybe effected by this.

"If you are neutral in situations of injustice, you have chosen the side of the oppressor. If an elephant has its foot on the tail of a mouse, and you say that you are neutral, the mouse will not appreciate your neutrality."

– Desmond Tutu

COMMUNITY SUPPORT

JEDI

CO JEDI

JUSTICE +
EQUITY +
DIVERSITY +
INCLUSION

TASK FORCE

CO JEDI

Aaron
Horst

Alex
Korter

Alison
Martin

Antoinette
Bunkley

Diamond
Davis

Jennifer
Swedell

Jon
Kanda

Marc
Dobbs

Kevin
McCausland

Makela
Wilson

Michael
Stebbins

Nayeli
Medina

Parini
Mehta

Phillip
White

Lauren
Coles

Megan
Todd

Virginia
Ramirez

Wynord
Thomas

MISSION

CO JEDI

OUR MISSION IS TO DISMANTLE SYSTEMIC RACISM BY TAKING DECISIVE ACTION AND EMPOWERING MARGINALIZED VOICES.

GOALS

CO JEDI

- ESTABLISH
- CREATE
- EDUCATE, INFORM, DISCUSS
- EMPOWER

INITIATIVE

1

INTRODUCTION TO CO

Communicate our mission statement and initiatives to the office and the community. Our goal is to provide continued awareness and visibility of the JEDI Task Force activities.

Antoinette Bunkley

Diamond Davis

JEDI COnnect Development.

Introduce CO JEDI to the architecture community, clients, consultants, etc.

Provide a simple narrative of what we stand for and what we are doing in the community via CO JEDI.

INITIATIVE

2

EDUCATION & COMMUNICATION WITHIN THE OFFICE

The purposse of this Initiative is to educate the office on systemic racism and bias by providing resources and tools that will help create spaces of inclusivity at CO and beyond.

Antoinette Bunkley

Diamond Davis

Create a list **defining the words** we are using to communicate.

- **Education** on Racism
- **Theory of Enchantment**
- **Implicit Bias Training** – across a spectrum of issues

CO Book Club

Books to educate yourself, your kids on racism (also includes a list of black-owned bookstores to support)

Acknowledge Holidays of all Cultures

INITIATIVE

3

SOCIAL JUSTICE: MOVING FROM AWARENESS TO ACTION

The Social Justice Initiative is committed to keeping our peers informed on local/national policies, social movements, and ways to facilitate positive change within our society.

Mike Stebbins

Subcommittee:
- Stephanie Horstman
- Kevin McCausland

Stay informed of local events to get involved.

Educate on a particular movement.

Research the local presence.

Take action in the community.

Volunteer your time.

INITIATIVE

4

COMMUNITY ENGAGEMENT / OUTREACH

4A. Our purpose is to expand office culture through the support of minority owned businesses and their local communities

4B. Our mission is to highlight and promote the work of minority artists in the Los Angeles area, to engage with multiple, creative perspectives in order to further JEDI's greater mission of inclusion, diversity, and equality

Aaron Horst

Makela WIlson

Subcommittee:
- Wyn Thomas (4A)
- Vicky Ramirez (4B)

4A. Commercial - Vendors related to operations of CO

Identify local Black and minority owned businesses to work with.

4B. Commercial - CO Gallery

Identify local Black and minority artists to showcase in the CO Gallery.

INITIATIVE

5

EDUCATION, SCHOLARSHIP, & MENTORSHIP

The CO JEDI Committee on Education Scholarship and Mentorship mission is to engage, inform and inspire future architects and their multiplicity of voices and viewpoints via CO's community and leadership program.

Alison Martin

Subcommittee:
- Gohar Nazaryan

Establish high school internship program for Black and minority students

Establish scholarship for Black and minority students

USC Architecture - A Lab Program

Engagement with historically Black colleges and universities (HBCU's)

Hampton University
Job Shadowing Program
Internship positions
SoCal NOMA Architecture Summer Camp

INITIATIVE

6

AEC INDUSTRY & COMMUNITY PARTNERSHIPS

6A. Collaboration and Partnerships – To create more opportunities in the AEC industry, we will actively look for ways to include minority-owned businesses in our projects and pursuits as partners, contributors, consultants or contractors.

6B. Community Collaboration – To engage in architectural pro-bono services that support and uplift underserved communities.

Phillip White

Alex Korter

Subcommittee:
- Aaron Horst
- Zach Sherrod
- Kerry Drake
- Megan Todd

Identify local Black and minority owned firms and businesses to partner with.

Participate in grant writing to fund community led projects - giving the power to marginalized communities to design their own cities.

Financial and human capital support to individuals, groups and organizations committed to educating and empowering Black and underrepresented minority groups in the design field.

Engage CO volunteers in local, one-day projects that support Black and minority neighborhoods.

INITIATIVE

7

SOCAL NOMA DIVERSITY, EQUITY, INCLUSION CHALLENGE

Through our partnership with SoCal NOMA we will work towards the Diversity Equity Inclusion Challenge. This is an annual challenge that will foster change in the architecture profession.

the NATIONAL ORGANIZATION of MINORITY ARCHITECTS

SOUTHERN CALIFORNIA CHAPTER

Lauren Coles

The mission of the Southern California Chapter of the National Organization of Minority Architects (SoCalNOMA) is to "to foster justice and equity in communities of color through outreach,community advocacy, professional development and design excellence."

We, CO Architects, take the SoCal NOMA Pledge.

CO JEDI – ANNUAL OPERATING BUDGET

INITIATIVES	Date Due	Budget	Actual	(Under) / Over
Initiative 1 | Introduction to CO				
JEDI COnnect Development		$ -	$ -	$ -
Intro to the Architecture Community		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
Sub Total		$ -	$ -	$ -
Initiative 2 | Education & Communication				
Defining the Words		$ -	$ -	$ -
Education on Racism		$ -	$ -	$ -
Theory of Enchantment	01/01/2021	$ -	$ -	$ -
Implicit Bias Traning		$ -	$ -	$ -
CO Book Club		$ -	$ -	$ -
Acknowledge Holidays of all Cultures		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
Sub Total		$ -	$ -	$ -
Initiative 3 | Social Justice: Awareness to Action				
Educate on a Particular Movement		$ -	$ -	$ -
Research the local presence		$ -	$ -	$ -
Take action in the Community		$ -	$ -	$ -
Volunteer your time		$ -	$ -	$ -
AIA LA | JEDI - Get Out the Vote		$ -	$ -	$ -
AIA Policy Platform		$ -	$ -	$ -
5 Day Polling Center		$ -	$ -	$ -
LA City Council Survey		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
Sub Total		$ -	$ -	$ -

TIME SHEET	Per Week	Per Month	Comments
Name			
Antoinette Bunkley			
Rachel Bascombe			
Kellie Iranon			
Alex Korter			
Sub Total	0	0	
Name			
Antoinette Bunkley			
Rachel Bascombe			
Vanessa Cartagena			
Nayeli Medina			
Sub Total	0	0	
Marketing			
Michael Stebbins			
Stephanie Horstman			
Kevin McCausland			
Sub Total	0	0	

INITIATIVES	Date Due	Budget	Actual	(Under) / Over
Initiative 4 | Community Engagement / Outreach				
4A - Commercial Vendors		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
4B - Commerical CO Gallery		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
Sub Total		$ -	$ -	$ -
Initiative 5 | Education, Scholarship & Mentorship				
High School Internship Program		$ -	$ -	$ -
Scholarship for Black and Minority Students		$ -	$ -	$ -
USC Architecture - A Lab Program		$ -	$ -	$ -
Internship Positions		$ -	$ -	$ -
Hampton University Partnership		$ -	$ -	$ -
•Finlandal Support		$ -	$ -	$ -
•Career Fair	02/03/2021	$ 250.00	$ -	$ (250.00)
•Volunteer Time		$ -	$ -	$ -
•Mentorships		$ -	$ -	$ -
•Internships		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
Sub Total		$ 250.00	$ -	$ (250.00)
Initiative 6 | AEC Industry & Community Partnerships				
6A - Collaboration and Partnerships		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
6B - Community Collaboration		$ -	$ -	$ -
(Pro Bono Work)		$ -	$ -	$ -
		$ -	$ -	$ -
Sub Total		$ -	$ -	$ -
Initiative 7 | SoCal NOMA Diversity, Equity, Inclusion Challenge				
Supportive Partner		$ 5,000.00	$ -	$ (5,000.00)
		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
		$ -	$ -	$ -
Sub Total		$ 5,000.00	$ -	$ (5,000.00)
Other		$ -	$ -	$ -
Other		$ -	$ -	$ -
Other		$ -	$ -	$ -
Other		$ -	$ -	$ -
Other		$ -	$ -	$ -
Sub Total		$ -	$ -	
Total Expenses		**$ 5,250.00**	**$ -**	**$ (5,250.00)**

TIME SHEET	Per Week	Per Month	Comments
Name			
Aaron Horst			
Wyn Thomas			
Vicky Ramirez			
Sub Total	0	0	
Name			
Parini Mehta			
Jennifer Swedell			
Gohar Nazaryan			
Alison Martin			
Sub Total	0	0	
Name			
Phillip White			
Alex Korter			
Aaron Horst			
Zach Sherrod			
Kerry Drake			
Sub Total	0	0	
Name			
Antoinette Bunkley			
Rachel Bascombe			
Zach Sherrod			
Sub Total	0	0	
Other			
Other			
Other			
Other			
Other			
Sub Total	0	0	
Total Hours	**0**	**0**	

KEY DATES:

FRIDAY, MARCH 5

FRIDAY, APRIL 23

FRIDAY, MAY 14

FRIDAY, JUNE 25

FRIDAY, JULY 23

TIME:

ONE DAY SESSION

9:00 AM TO 5:00 PM

MEET CHLOÉ VALDARY

The Founder

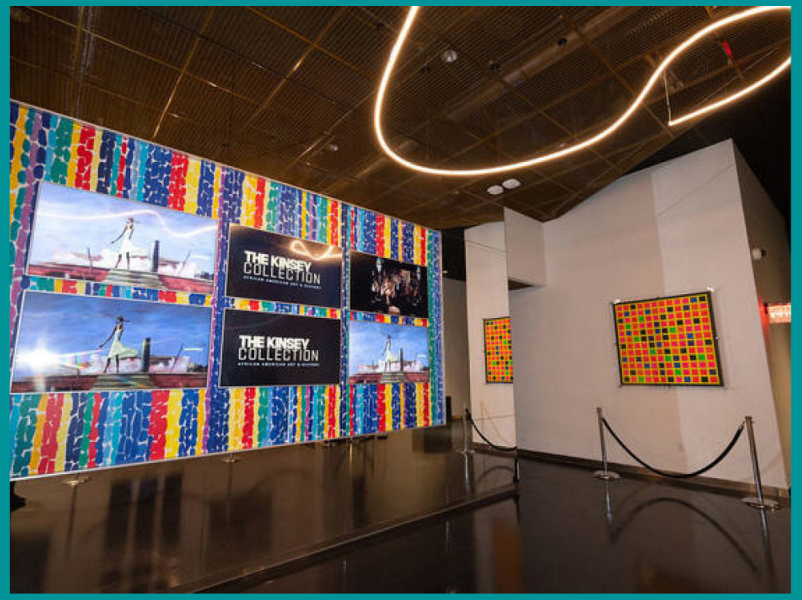
After spending a year as a Bartley fellow at the Wall Street Journal, Chloé Valdary developed The Theory of Enchantment, an innovative framework for compassionate antiracism that combines social emotional learning (SEL), character development, and interpersonal growth as tools for leadership development in the boardroom and beyond.

Chloé has trained around the world, including in South Africa, The Netherlands, Germany, and Israel. Her clients have included high school and college students, government agencies, business teams, + many more.

She has also lectured in universities across America, including Harvard and Georgetown. Her work has been covered in Psychology Today Magazine and her writings have appeared in the New York Times and the Wall St Journal.

CO GALLERY

CO JEDI



BALCONY HOUR

CO JEDI

WORLD TOUR

BALCONY HOUR

NAME: **CO ARCHITECTS**

FROM: **ANYWHERE** TO: **NORTH BALCONY**

FLIGHT: **J57** DATE: **AUG 18** SEAT: **50E**

GATE: **5D** BOARDING TIME: **5:00 - 6:00PM**

JEDI AIRLINE PRESENTS **WORLD TOUR PACKAGE**

CONTINUE THE CONVERSATION

[Full Episode: "DARK GIRLS 1" | Dark Girls | Oprah Winfrey Network – YouTube]

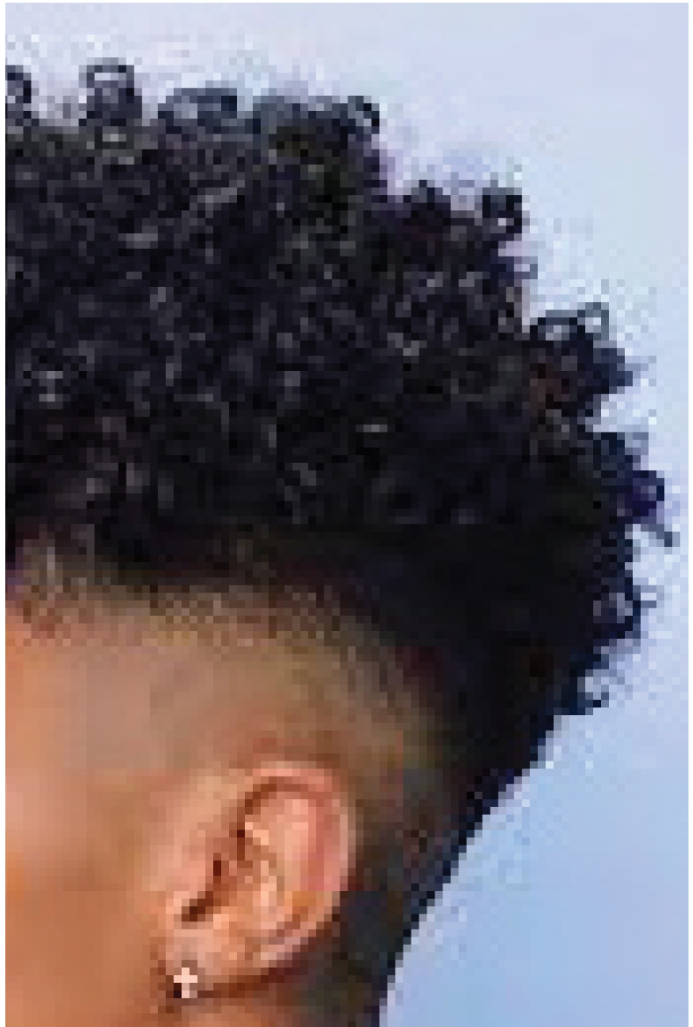
"Dark Girls" is a fascinating and controversial film that goes underneath the surface to explore the prejudices dark-skinned women face in the world. It explores the roots of classism, racism and ...

www.youtube.com

CO JEDI

CONTINUE THE CONVERSATION

PSYCHOLOGY OF BLACK HAIR



SUCCESSES!

CO JEDI

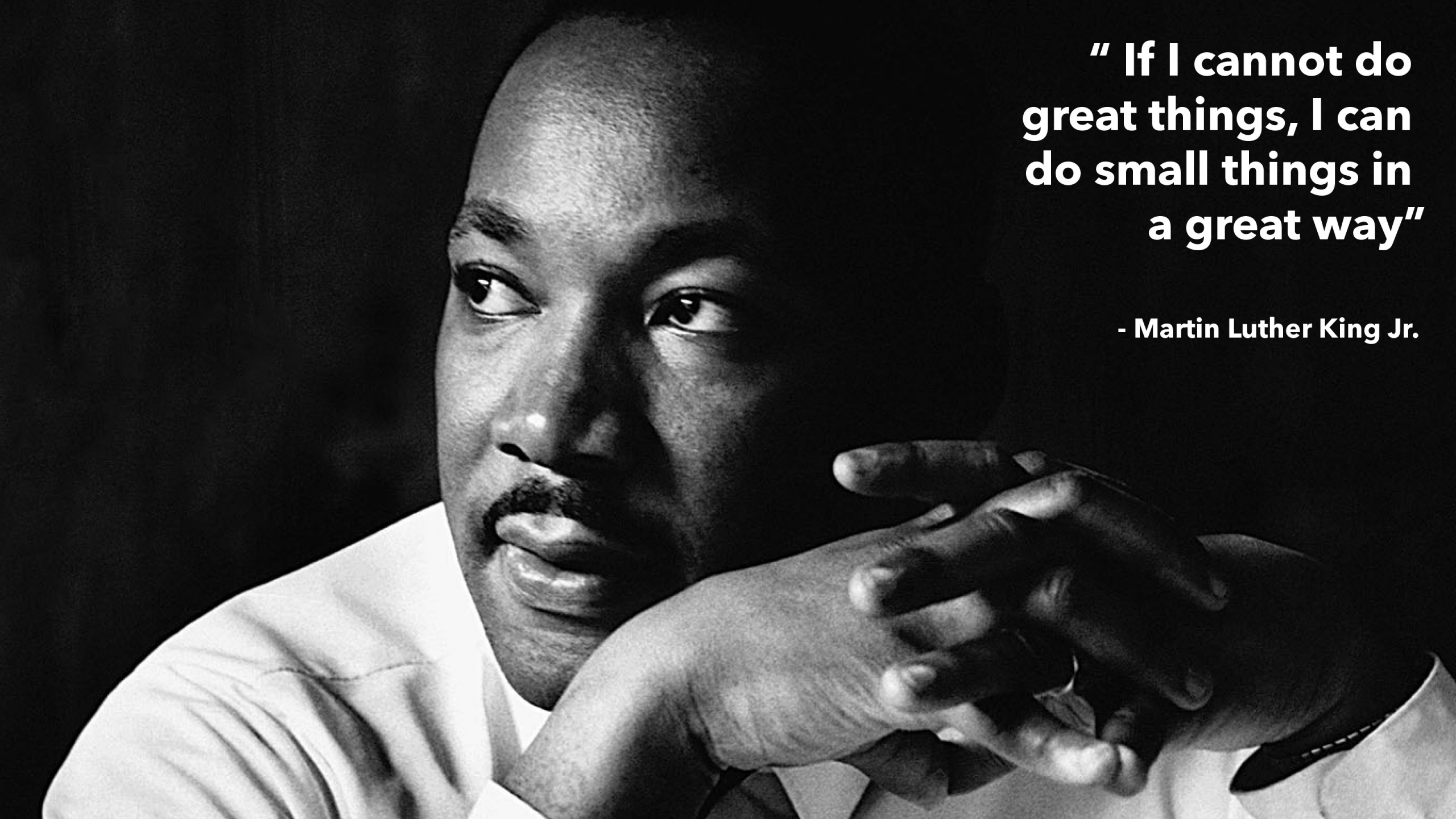
1. ACKNOWLEDGE HOLIDAYS OF ALL CULTURES
2. INCREASED DOING BUSINESS WITH LOCAL BLACK & MINORITY OWNED BUSINESSES
3. SUPPORT BLACK & MINORITY ARTISTS
4. INCREASED PARTICIPATION IN HIGH SCHOOL ARCHITECTURE PROGRAM
5. INCREASED PARTICIPATION IN INTERNSHIP PROGRAM
6. DATABASE OF A/E BLACK & MINORITY FIRMS TO PARTNER WITH
7. COMPLETED SOCAL NOMA DEI CHALLENGE

CHALLENGES

CO JEDI

1. SOCAL NOMA SUMMER CAMP
2. CONNECT WEB PAGE LAUNCH
3. LIASION WITH MANAGEMENT COMMITTEE
4. DECREASE IN TASK FORCE PARTICIPATION
5. LOSS OF TASK FORCE MEMBERS
6. LOSS OF TASK FORCE CO-LEADER

The JEDI Task Force is proud to encourage the celebration of holidays of all cultures as part of **Initiative #2 - Education and Communication within the Office**. This February we want to recognize Black History Month.


“ If I cannot do great things, I can do small things in a great way”
- Martin Luther King Jr.

SMALL FIRMS – GREAT WAY

Advantages

- Leadership Support
- Less Bureaucracy
- Personal Face-to-Face
- Faster Responses

Challenges

- Why
- Financial Resources
- Time
- Multiple Hats

SMALL FIRMS – DIVERSITY, EQUITY & INCLUSION

Start Small

- Leadership Support
- Seek out Interest
- Establish a Mission Statement
- Create an Initiative

Course of Action

- Establish a Course of Action
- Create a Budget
- Implement Course of Action
- Follow Through
- Maintain Momentum

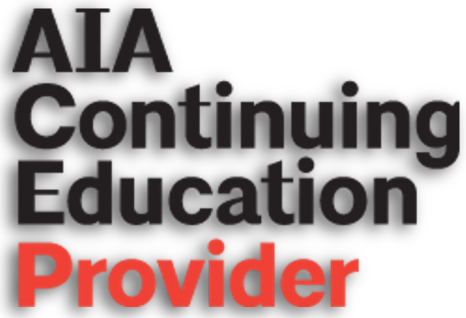
QUESTIONS?

The EntreArchitect™ Community
ANNUAL MEETING
The International Conference for Small Firm Entrepreneur Architects
Austin, Texas · November 1-3, 2022
With support from Monograph

Thank you for supporting Session 1.

Morning Break

AIA CES Provider Statement



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R

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The Birds + Bees of Post Pandemic Branding

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SHOW OF HANDS

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What is a brand?

Campbell's
CONDENSED
Tomato
SOUP

Campbell's
CONDENSED
TOMATO
SOUP
Campbell's
CONDENSED
TOMATO
SOUP
Campbell's
CONDENSED
TOMATO
SOUP

ROOT + RIVER
JEWEL SAMAD/AFP/GETTY IMAGES
AUTHENTIC OR FILTERED
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COMPELLING

INTEGRITY
DISSENT IS PATRIOTIC
WE THE PEOPLE
ACLU
TINY HANDS CAN'T Hold Back PROGRESS
YOU'RE FIRED
Rising tides lift all
DIVERSITY is our RIGHT
FREE QUALITY PUBLIC SCHOOLS ARE THE FOUNDATION FOR A DEMOCRACY
WE WILL TAKE NOT ONE STEP BACKWARDS
I'M WITH HER
WRONG
WRONG
FEMINIST
NOBODY PUTS MY BABY
ABORTION SAVES LIVES
TRUST WOMEN
RESPECT EXISTENCE OR
Trumps HATE
Too NORMAL
GIRLS JUST WANNA HAVE FUN-DAMENTAL RIGHTS
Well Behaved Women rarely Make History
WELL BEHAVED
SCIENTISTS
THE FUTURE IS
NASTY
THOU SHALT NOT MESS WITH WOMENS REPRODUCTIVE RIGHTS
IN OUR AMERICA LOVE WINS
MARCH FOR AMERICAN VALUES
RAISED TO RISE UP
LOVE IS LOVE
THIS IS THE WING
NASTY WOMEN
HE STARTED IT
PUSS OFF
IF I make my UTERUS A CORPORATION will you stop REGULATING it?
I'm not free when any woman is unfree
PRO PRO PRO
RESPECT
Men Can Embrace EQUALITY
WE'RE NOT BACK
DISSENT IS PATRIOTIC
ALLY
WOMEN ARE HUMAN BEINGS

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Polaroid Spectra System
WE TAKE YOUR PICTURES SERIOUSLY
3:51
Eyewitness NEWS 4,5,6 & 10
23
Friends
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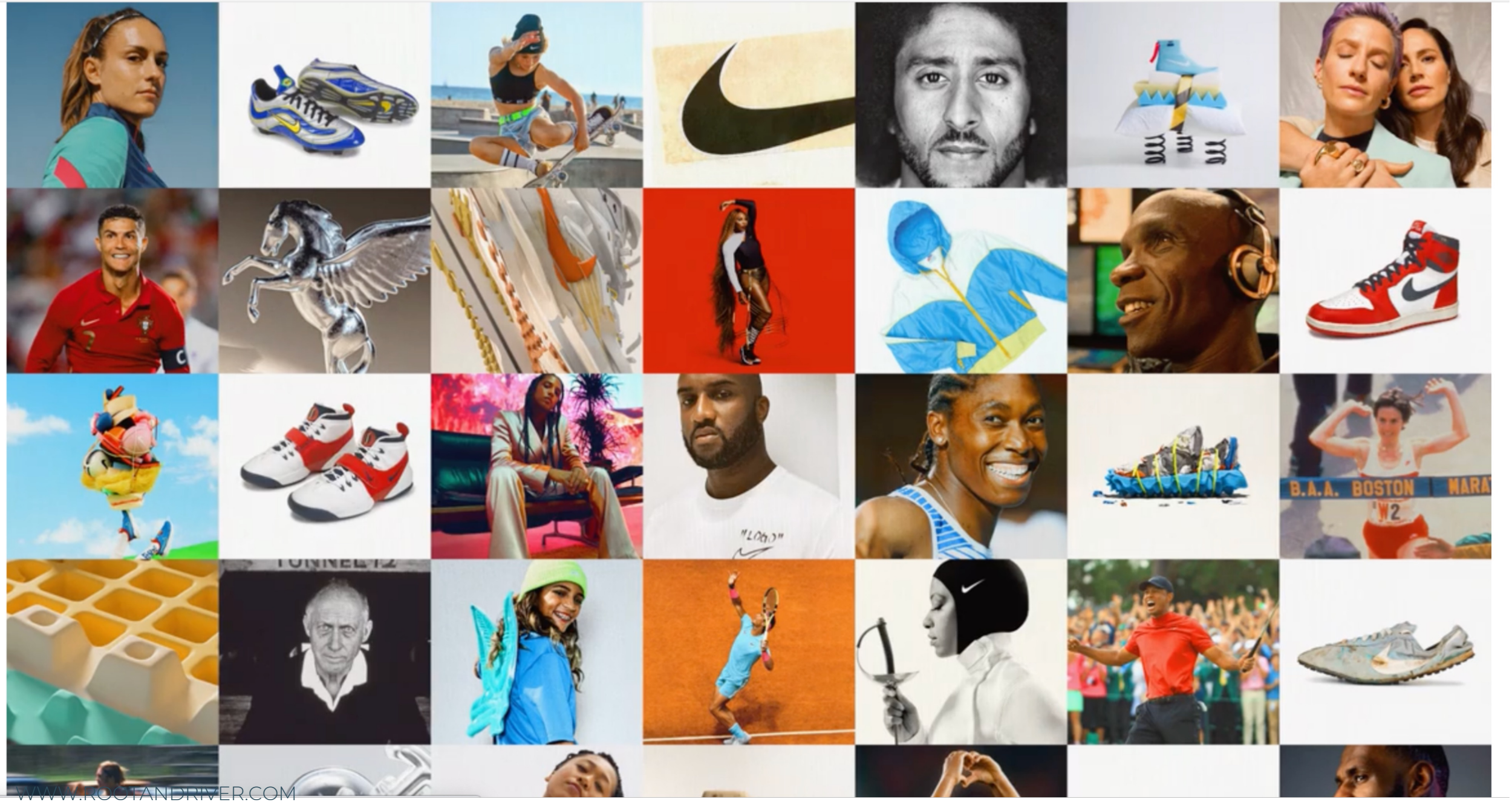
B.A.A. BOSTON

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How other people *experience* what you *believe*

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INNINGS
INNINGS

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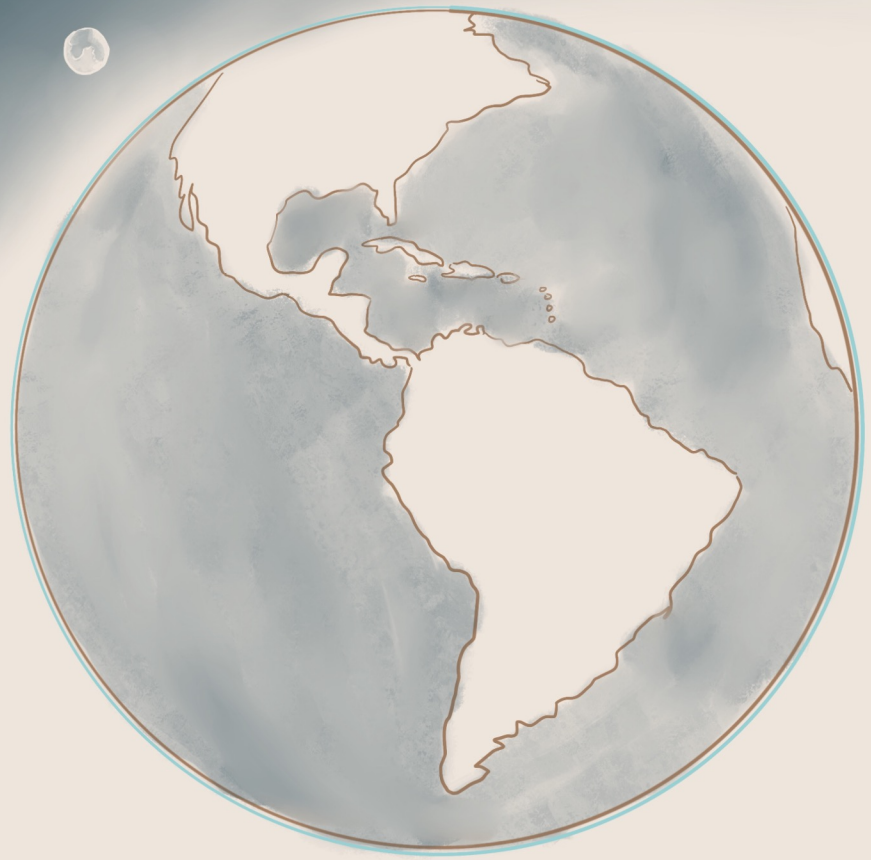
Why do brands matter?



Infodemic

Glut of information, sources and updates have resulted in erosion of trust in all news sources

Source: 2021 Edelman Trust Barometer

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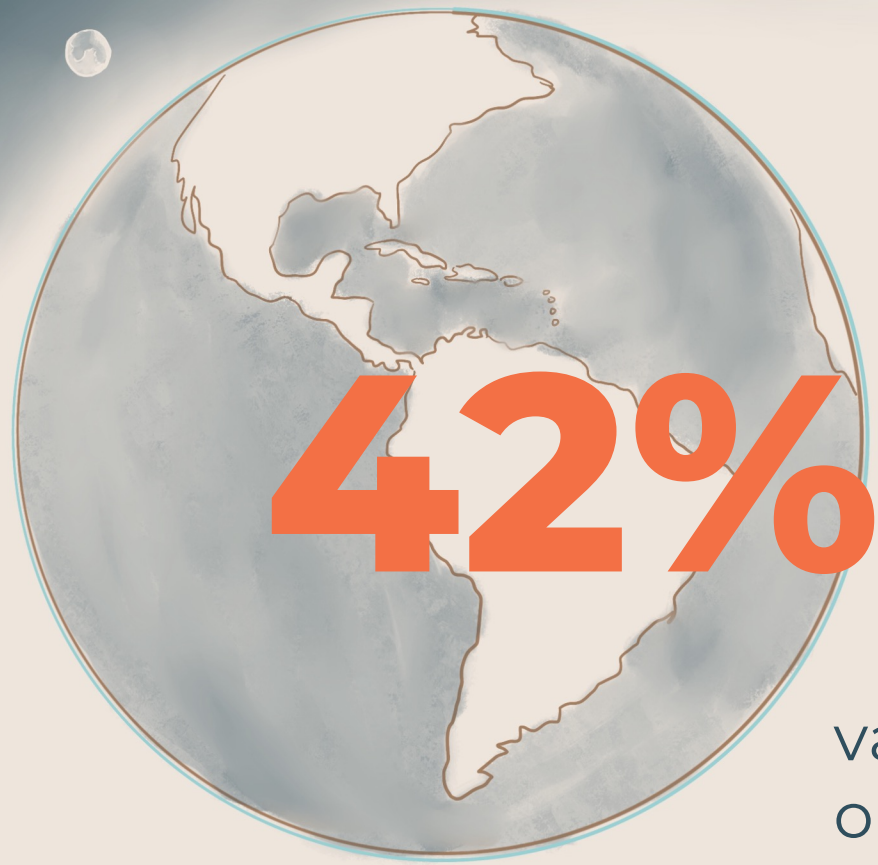
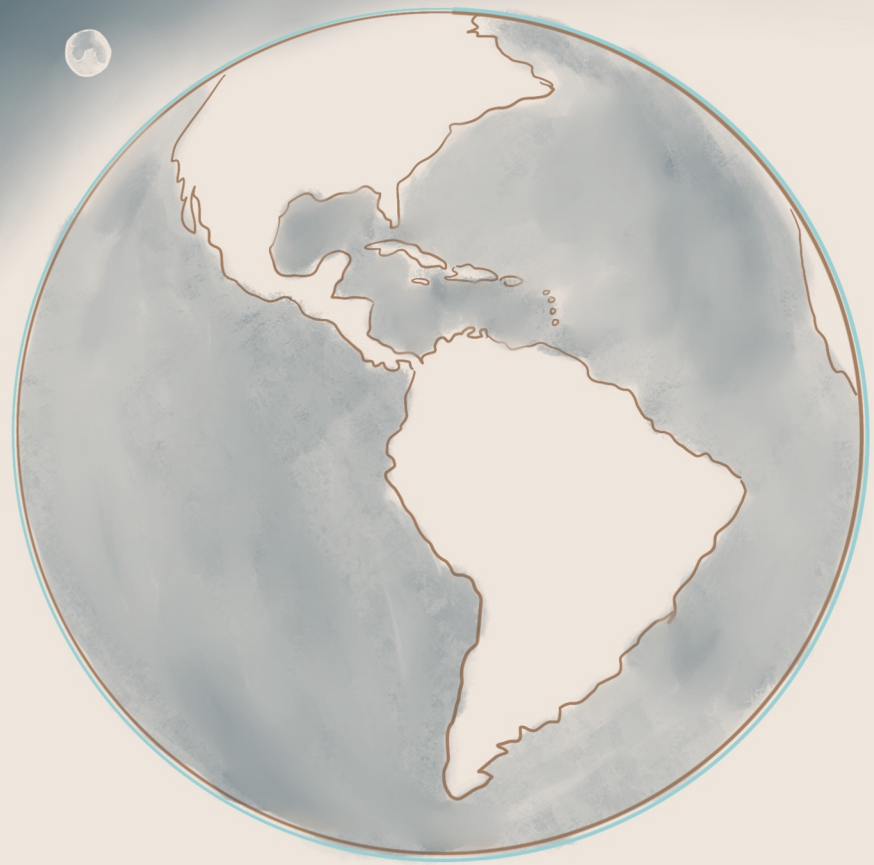


42% to 1681%

various rates purpose-driven businesses outperform their neutral counterparts

Source: Kantar's 2018 Purpose Study, Global Leadership Forecast 2018 by
DDI World, Unilever's Sustainable Living Brands, Interbrand's Best Global Brands 2017



ONLY 28%

of employees understand a brand's values

Harvard Business Review,, Journal of Brand Management, Tenet Partners, 2017

1 in 5

employees strongly agrees that company leaders communicate how employees should live out the brand values in their jobs.

Harvard Business Review,, Tenet Partners, 2017

Sea of Sameness

Photo by Federico Giampie via unsplash

297 million

Exhausted

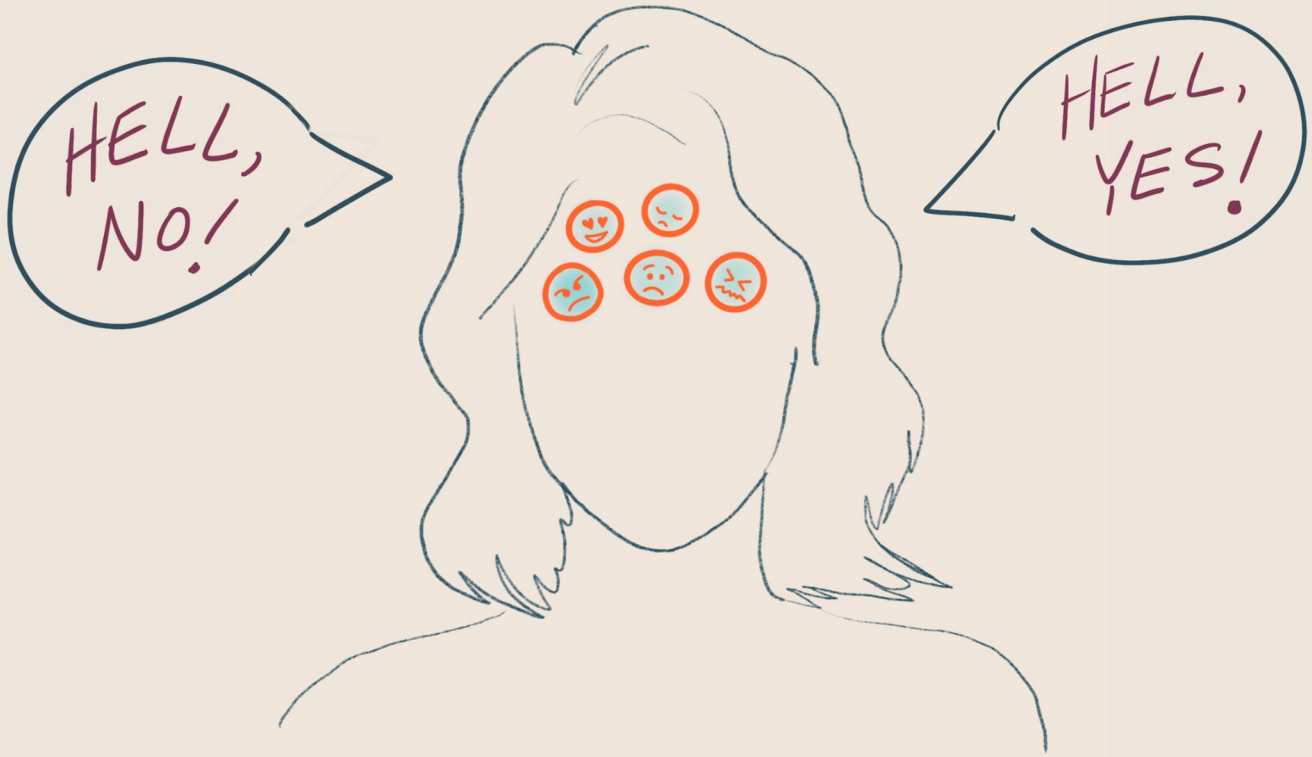
Photo by Ketut Subiyanto Via Pexels

83% of CEOS +
70% of employees

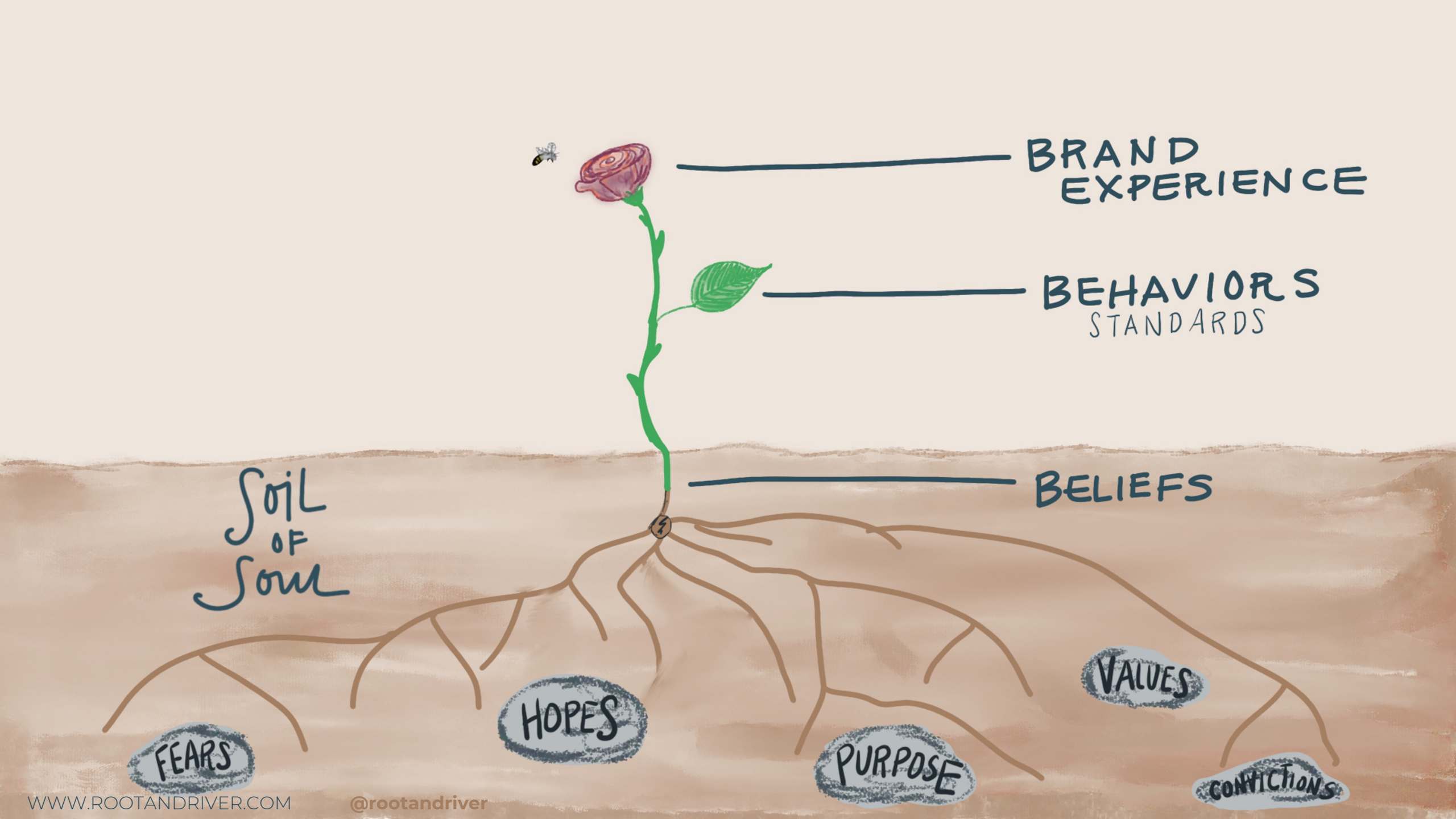
Report missing at least one day of work due to stress, burnout and mental health challenges

Study by Headspace Health, 2022

Decision Fatigue



WHERE DO BRANDS COME FROM?


BRAND EXPERIENCE
BEHAVIORS
STANDARDS
BELIEFS
Soil of Soul
FEARS
HOPES
PURPOSE
VALUES
CONVICTIONS

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Why do you

a brand?

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To create obvious differentiation

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To attract the right people (and repel the wrong ones)

ROOT + RIVER

To align marketing and biz dev efforts with your business strategy

6 Traits of a Flourishing Brand

1. Root System
2. Message + Language
3. Ideal Audience
4. Differentiation
5. Category Ownership
6. Storytelling + Thought-Leadership

Exercise:

Rank on a scale of 1 to 10 to determine the opportunity to develop your brand.

ROOT SYSTEM

Our mission, vision and values are concise, clear and obvious to all of the humans who touch the brand.

MESSAGING + LANGUAGE

We are confident and enthusiastic about our message and have infused it in all of our brand language.

IDEAL AUDIENCE

We have a clear idea of who we want to attract and who we want to repel.

DIFFERENTIATION

We know what makes us obviously different and so do our clients.

CATEGORY OWNERSHIP

We have identified a unique category and are owning it through thought-leadership and brand experience.

STORYTELLING + THOUGHT-LEADERSHIP

Storytelling is a discipline for us. We produce consistent content in our area of expertise.

Areas of
Opportunity
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BRAND

Knowing what to say

MARKETING

having the conversation

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Poor Marketing is...

- Intrusive
- Dehumanizing
- Mechanized BS
- Cult of sameness

Healthy Marketing is...

- Empathetic
- Invitational + Inspirational
- Told in Stories
- Clear

Want more?

Subscribe www.rootandriver.com

Connect!

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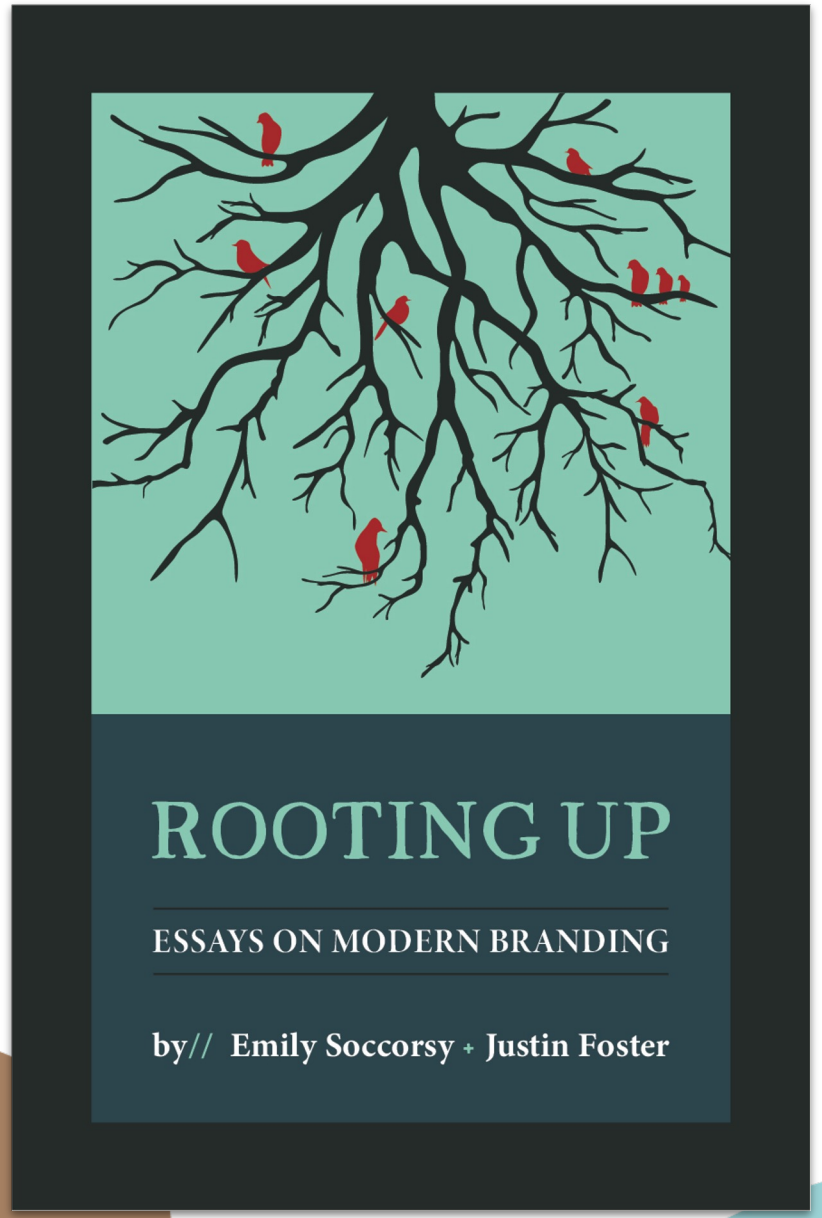

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Thank You! | ROOT + RIVER

emily@rootandriver.com
@emilyatlarge
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The EntreArchitect™ Community
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Austin, Texas · November 1-3, 2022
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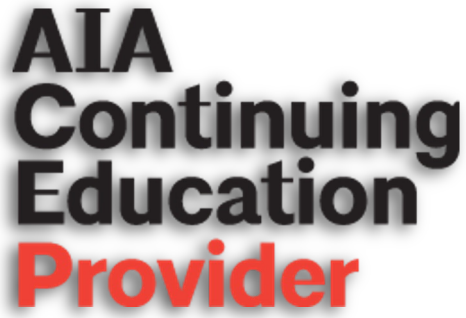

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the

Pretty Good House

PGH Rules

1. Consider the house as a system.
2. Build no larger than necessary.
3. Build simply.
4. Make energy improvements until they stop making sense.
5. Prioritize good indoor air quality.
6. Support your local economy.
7. Support local and global ecosystems.
8. Build durable, resilient homes.
9. Design homes with aesthetic appeal.

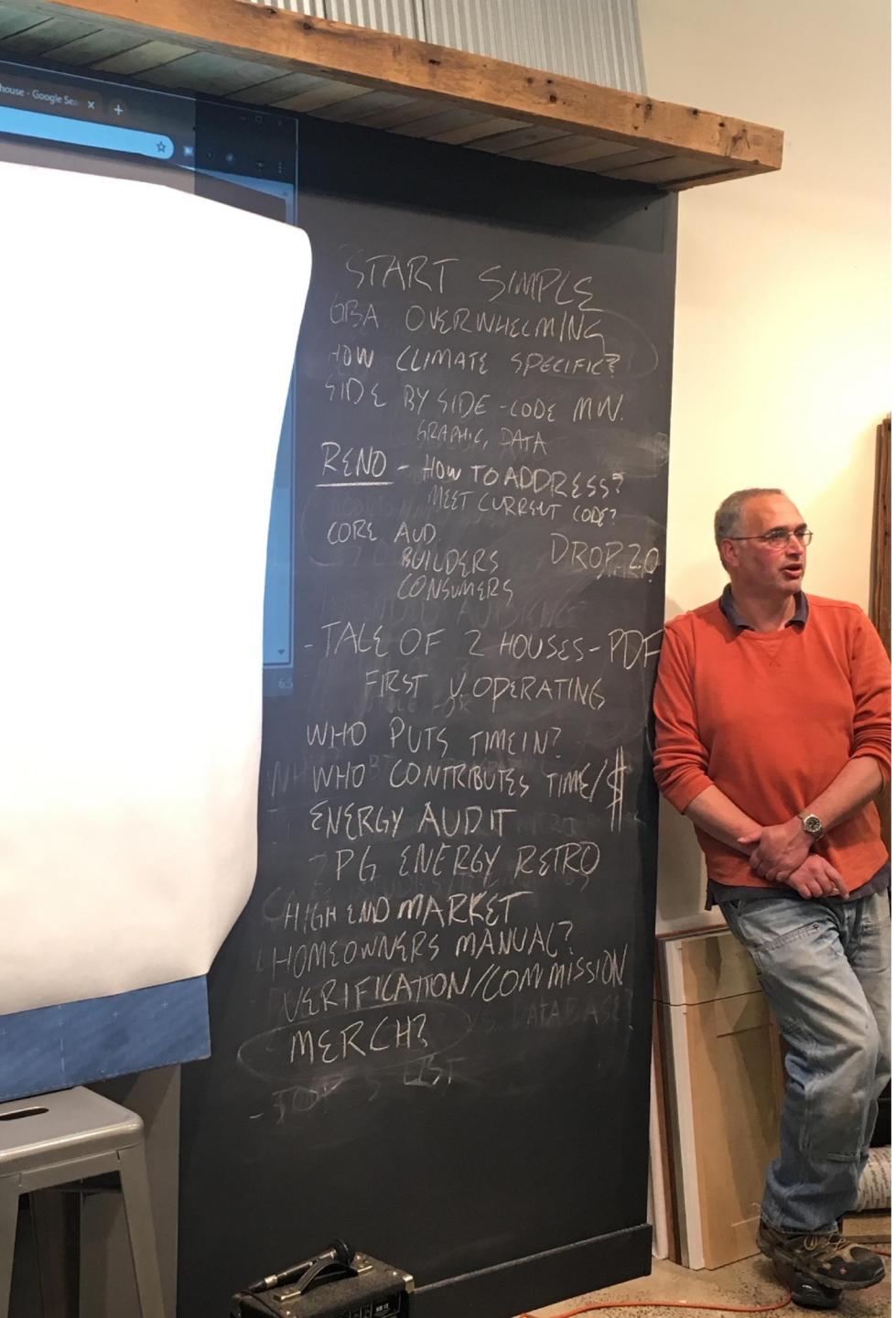
Other Programs That Have Helped Shape Building Better Homes

A big thank you to the other programs that have inspired us to build better things – working through these programs has helped bring PGH to life. While we value these programs immensely - PGH is not a standard

To mention a few

- LEED For Homes
- Energy Star
- Passive House
- Living Building Challenge
- Well Building
- DOE ZEH

Pretty Good House provides a framework and guidelines to focus on the core issues that should be front and center when designing and building a high quality home or renovation.



How it Started

In southern Maine, there's a small group of building professionals that get together monthly to discuss building science. It sounds boring, we know, but truly it isn't.

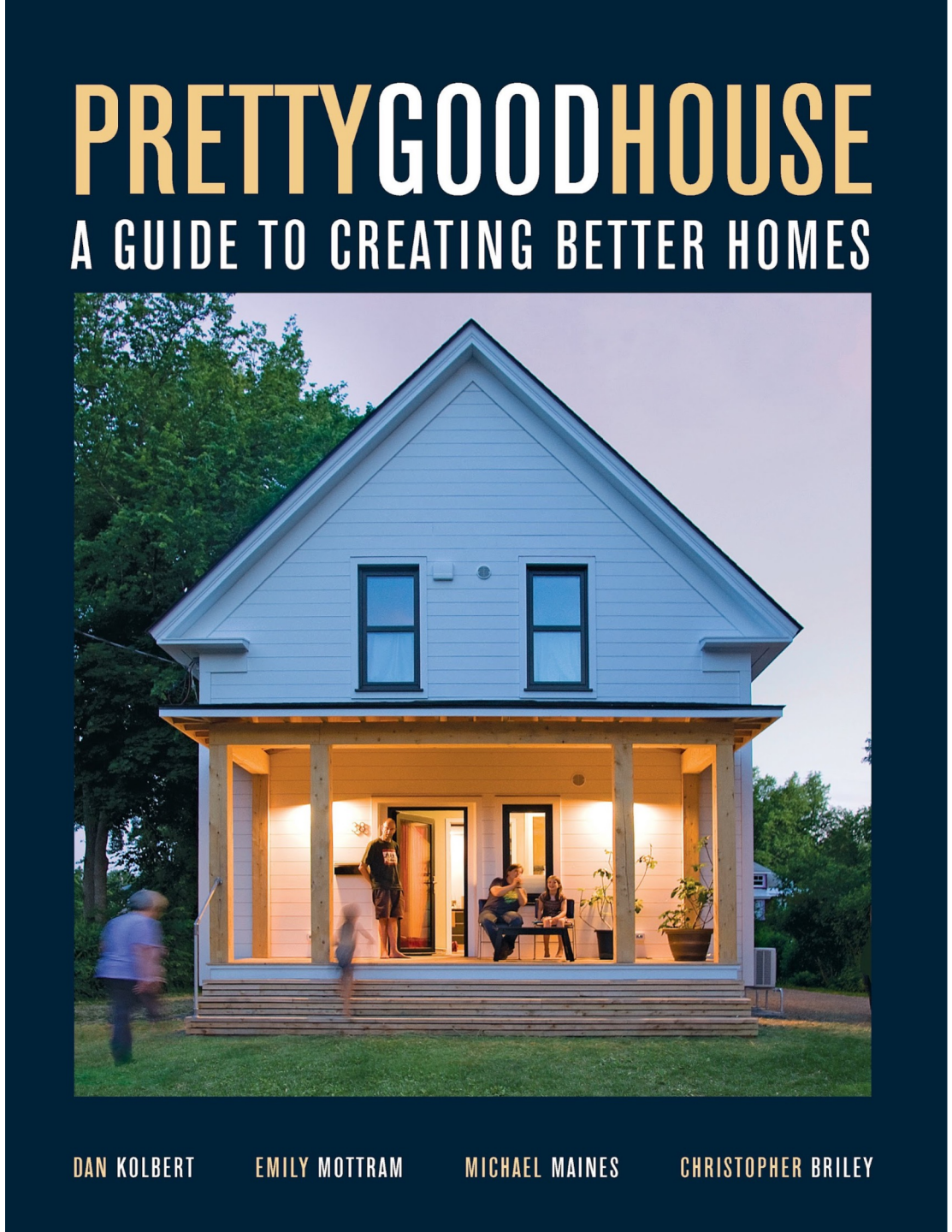
Food is brought in, beer is consumed, a blackboard is present and a topic is brought up for discussion. (topics like, high performance windows, venting cathedral ceilings, moisture migration in wall assemblies, slab on grade details, etc.)

Since we are all peers, and colleagues (with egos, attitude, and a good sense of humor) the conversation is usually lively, informal and frankly all over the place. Builder Dan Kolbert (pictured left) is the moderator and at one meeting, on a rant he, expressed frustration with the status quo, and even more frustration with the various rating systems that had him jumping through many hoops to prove that his work was in fact "green" and energy efficient. As many can attest, these systems can be very costly in time and money, and in the case of many green projects, they aren't doing anything to advance the project. Rather they are simply certifying them.

So Dan simply stated, "I just want to build a pretty good house."

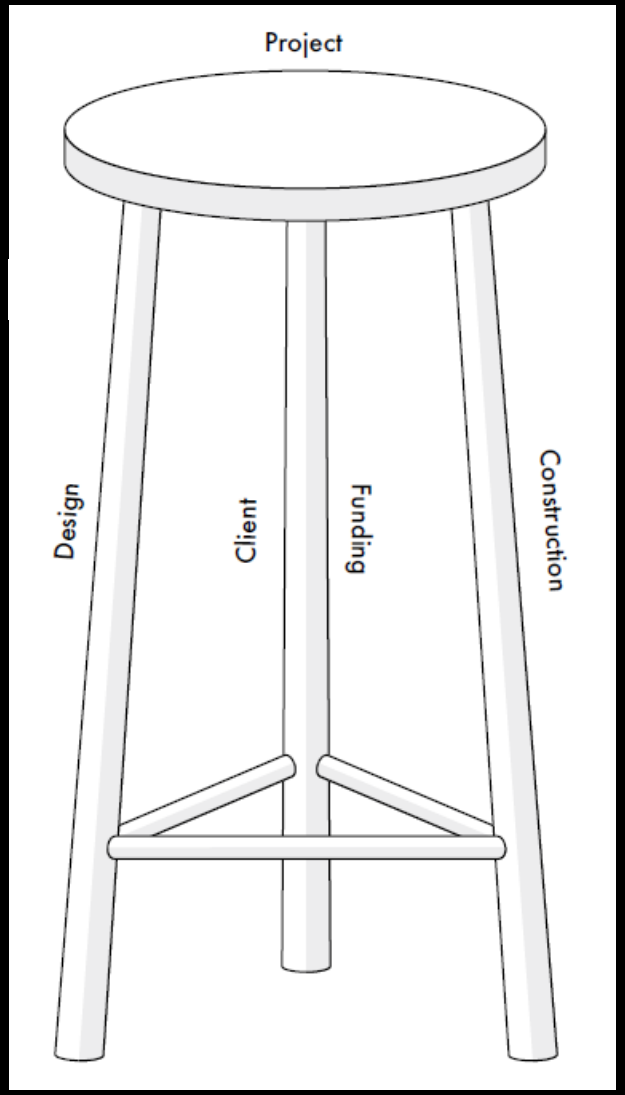
What Makes PGH Special

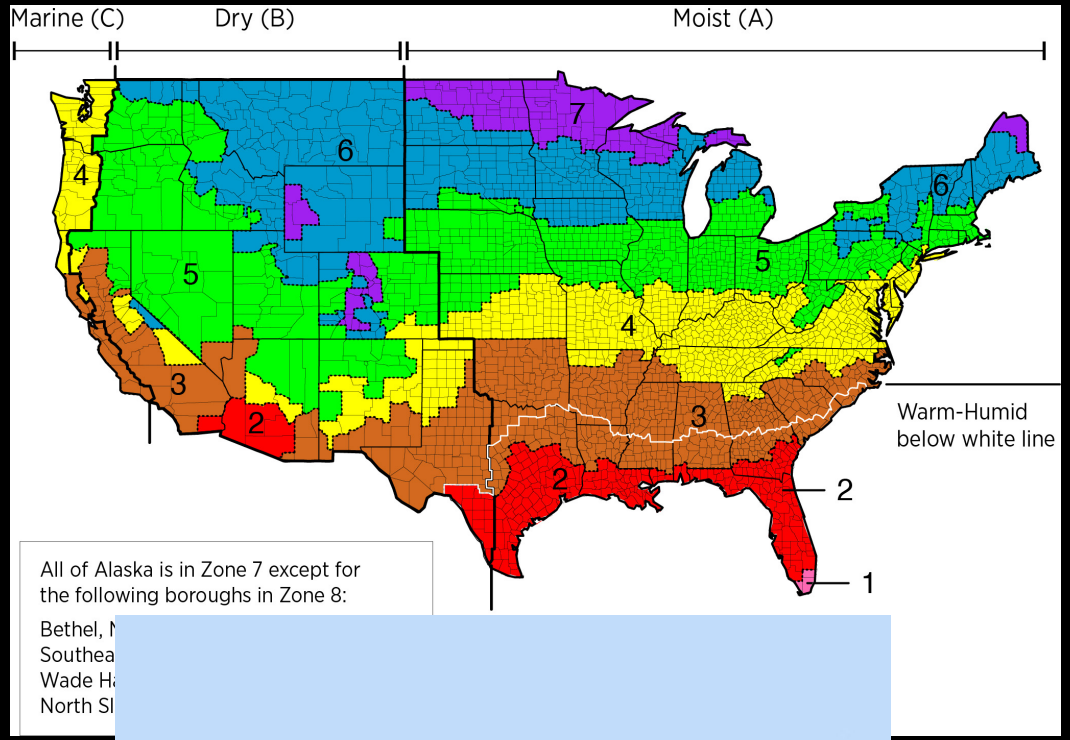
- Economics – rarely has anyone designed or built a home for a client that did not have a budget
- Focusing on lower carbon or carbon sequestering
- It's a team approach meant to rely on the skills each team member brings to the table.



Things to Know Before You Start

- Climate
- Team
- Constraints
  - Regulatations
  - Infrastructure
  - Budget

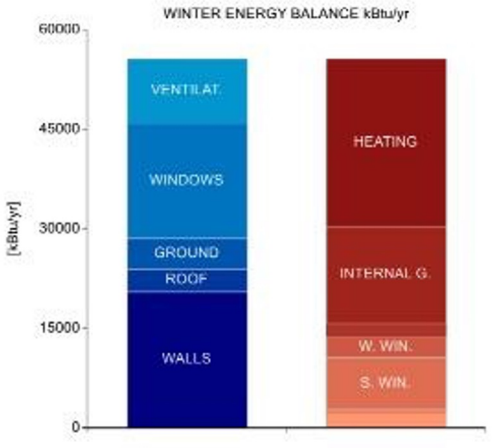


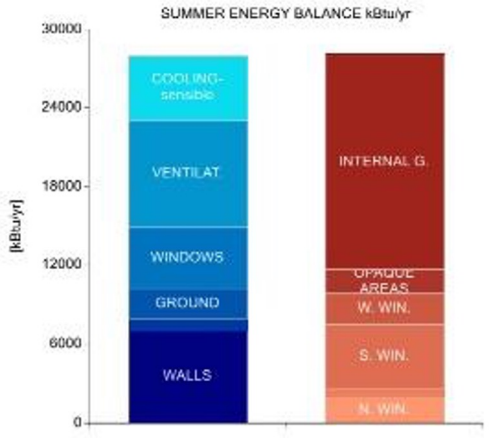


Economics

ANNUAL HEAT DEMAND		
Transmission losses :	**46,468**	kBtu/yr
Ventilation losses:	**9,689**	kBtu/yr
Total heat losses:	**56,157**	kBtu/yr
Solar heat gains:	**15,877**	kBtu/yr
Internal heat gains:	**14,695**	kBtu/yr
Total heat gains:	**30,571**	kBtu/yr
Utilization factor:	**99**	%
Useful heat gains:	**30,265**	kBtu/yr
Annual heat demand:	**25,893**	kBtu/yr
Specific annual heat demand:	**7,922.3**	Btu/ft²yr

ANNUAL COOLING DEMAND		
Solar heat gains:	**11,645**	kBtu/yr
Internal heat gains:	**16,379**	kBtu/yr
Total heat gains:	**28,024**	kBtu/yr
Transmission losses :	**21,963**	kBtu/yr
Ventilation losses:	**11,826**	kBtu/yr
Total heat losses:	**33,789**	kBtu/yr
Utilization factor:	**68.4**	%
Useful heat losses:	**23,121**	kBtu/yr
Cooling demand - sensible:	**4,903**	kBtu/yr
Cooling demand - latent:	**83**	kBtu/yr
Annual cooling demand:	**4,986**	kBtu/yr
Specific annual cooling demand:	**1.5**	kBtu/ft²yr





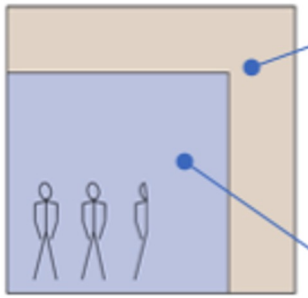
PGH RECOMMENDED SIZES

1-person
600-1000 ft²

2-person
800-1500 ft²

3-person
1200-1750 ft²

4+person
1600-1875 ft²



US NATIONAL AVERAGE: 2.5 OCCUPANTS, 2687 FT²

PGH FOR 2.5 OCCUPANTS: 1600 FT²

Things to Think About

Annual Energy Cost	
Electric	$390

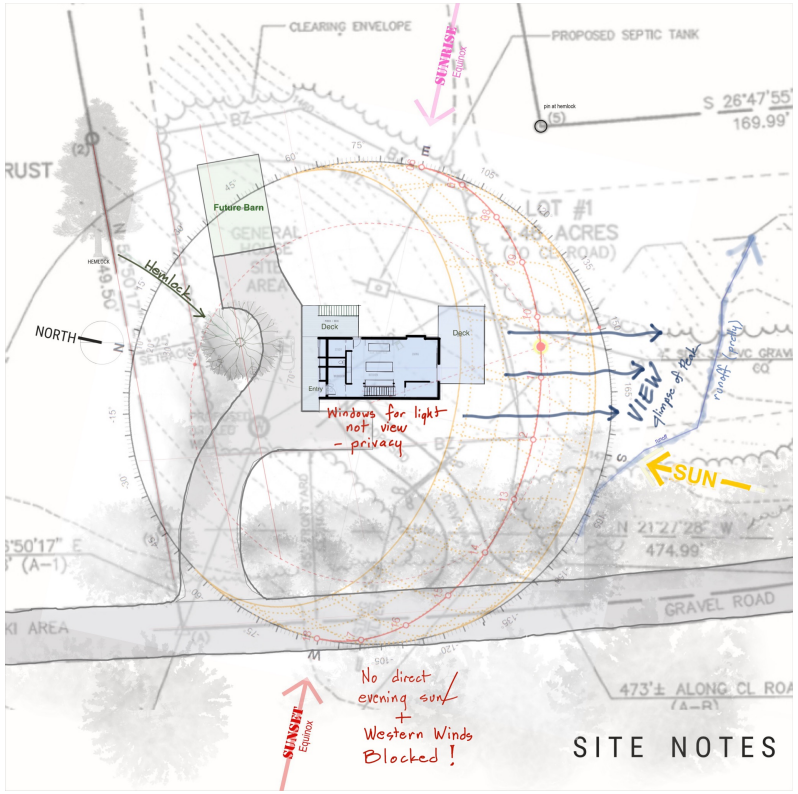
Annual End-Use Cost	
Heating	$1,014
Cooling	$13
Water Heating	$149
Lights & Appliances	$883
Onsite Generation	-$1,670
Service Charges	$0
Total	$390

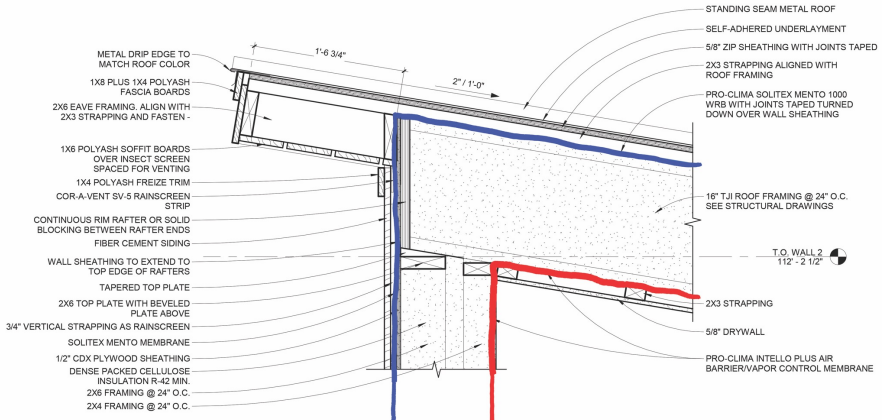
Annual End-Use Consumption	
Heating [Electric kWh]	5,963.3
Cooling [Electric kWh]	78.0
Hot Water [Electric kWh]	876.1
Lights & Appliances [Electric kWh]	5,195.3
Total [Electric kWh]	12,112.6
Total Onsite Generation kWh	9,820.9

Peak Electric Consumption	
Peak Winter kW	2.95
Peak Summer kW	1.12

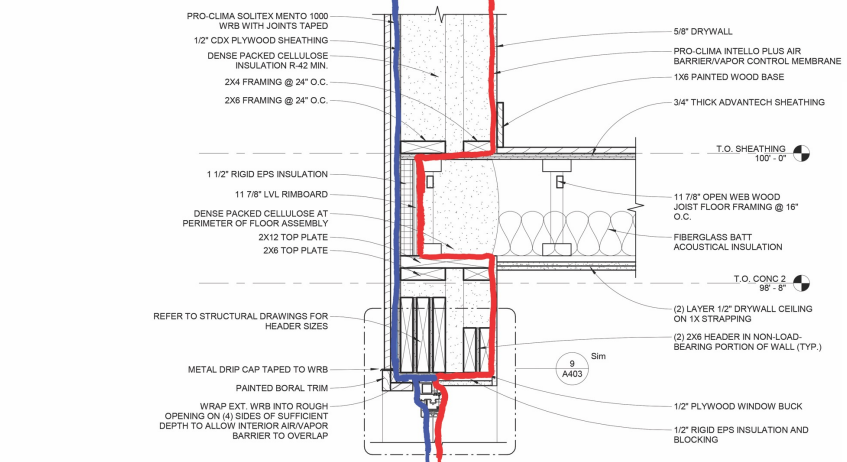
Utility Rates	
Electricity	Elc .17 kwh

Design

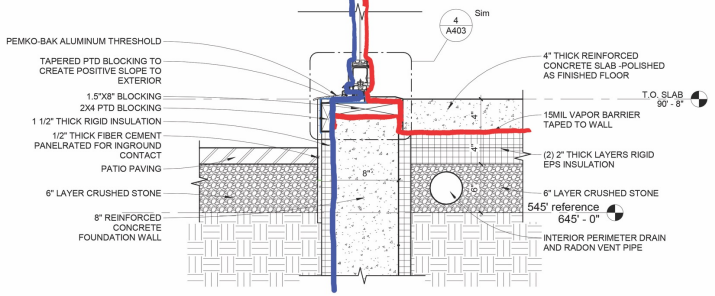

CLEARING ENVELOPE
PROPOSED SEPTIC TANK
SUNRISE Equinox
S 26°47'55"
169.99'
Future Barn
LOT #1
1.45 ACRES
Hemlock
NORTH
Deck
Deck
Entry
Windows for light not view - privacy
VIEW
SUN
N 21°27'28" W
474.99'
GRAVEL ROAD
473'± ALONG CL ROA
SUNSET Equinox
No direct evening sun
+
Western Winds Blocked !
SITE NOTES



6 SECTION DETAIL - HIGH EAVE
1 1/2" = 1'-0"

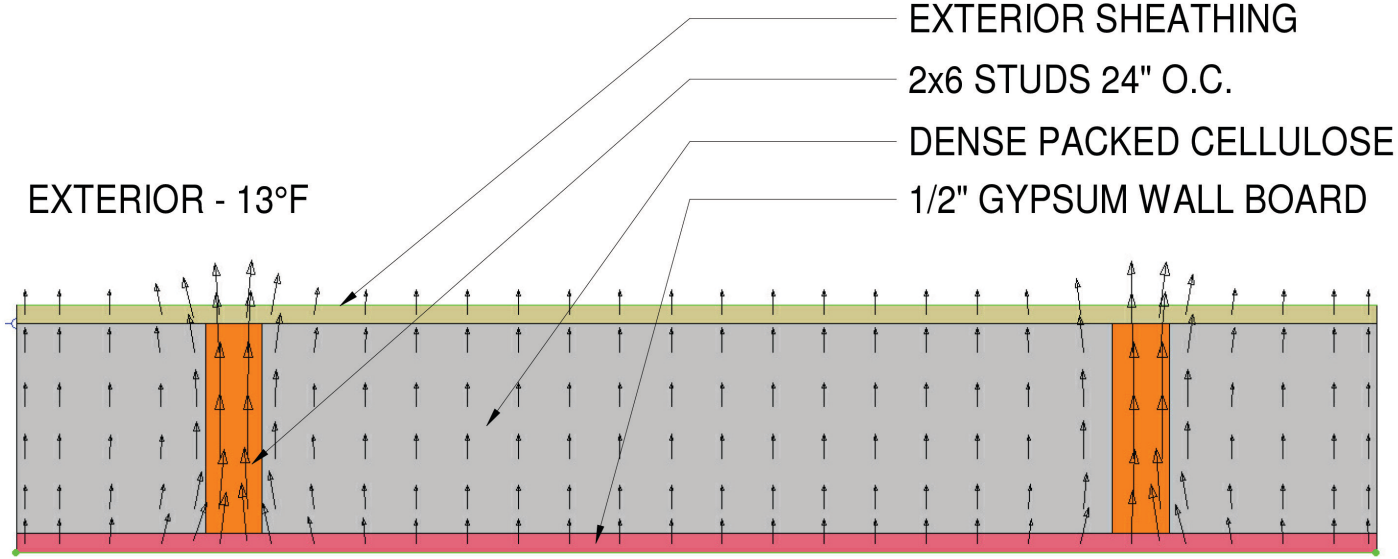


5 SECTION DETAIL - FIRST FLOOR EDGE
1 1/2" = 1'-0"



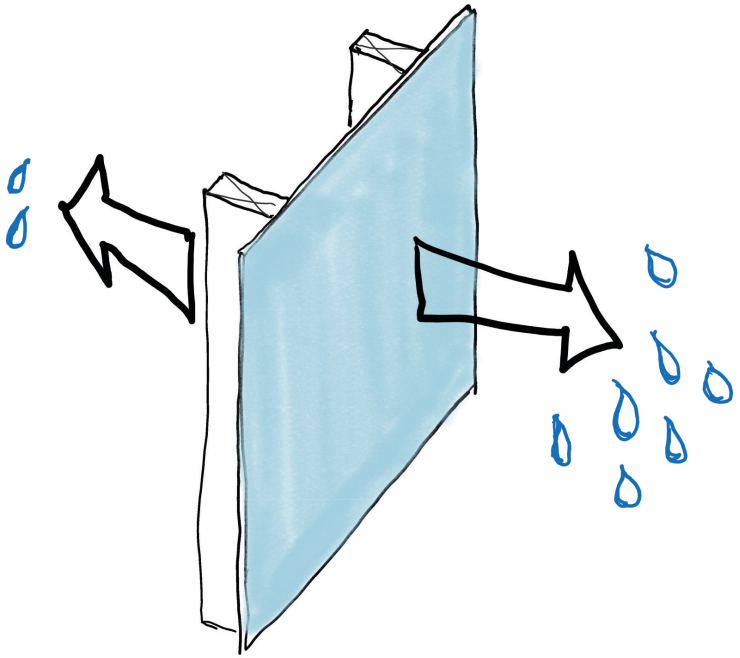
4 SECTION DETAIL - SLAB EDGE AT DOOR
1 1/2" = 1'-0"

Building Envelope Basics

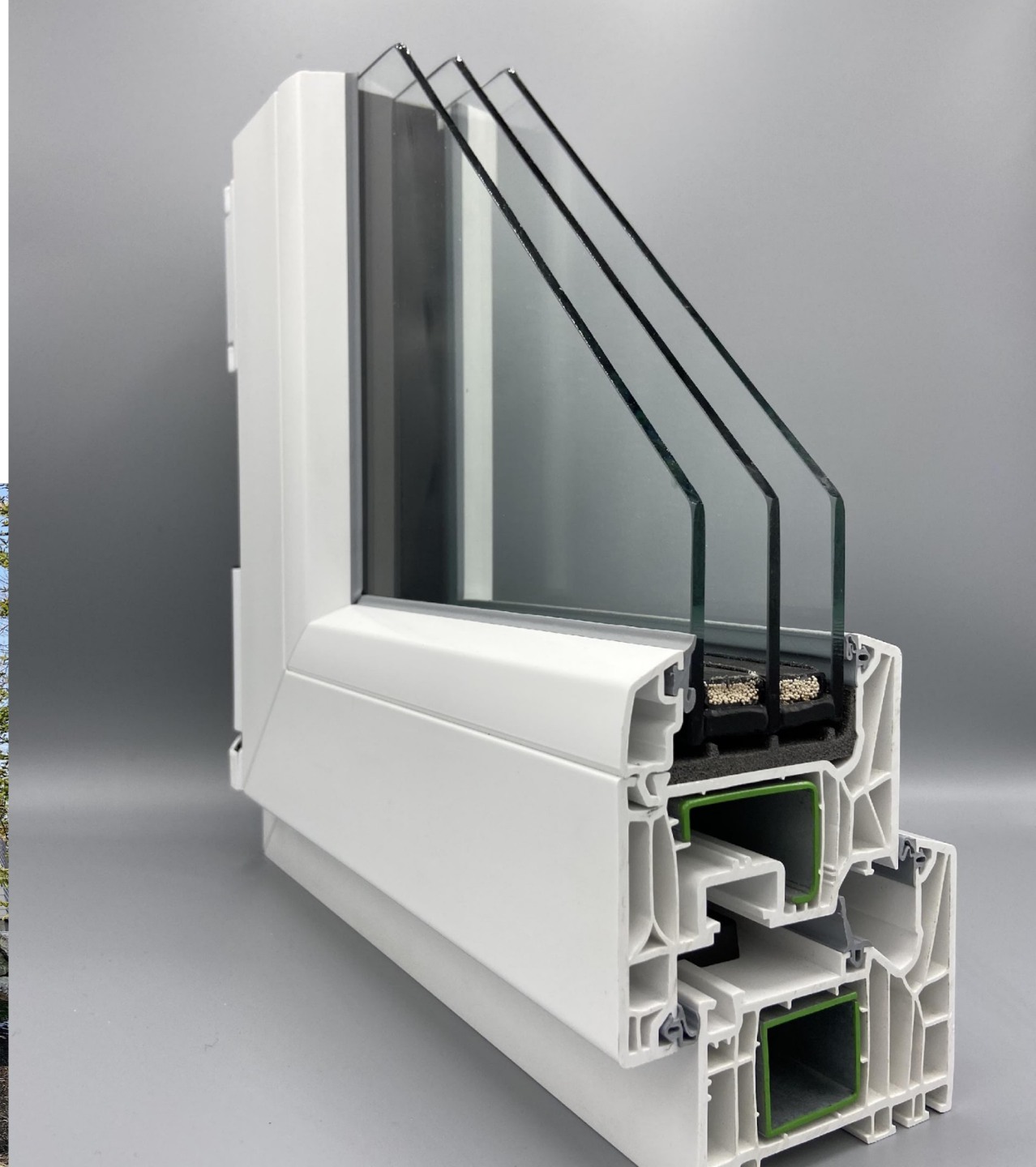


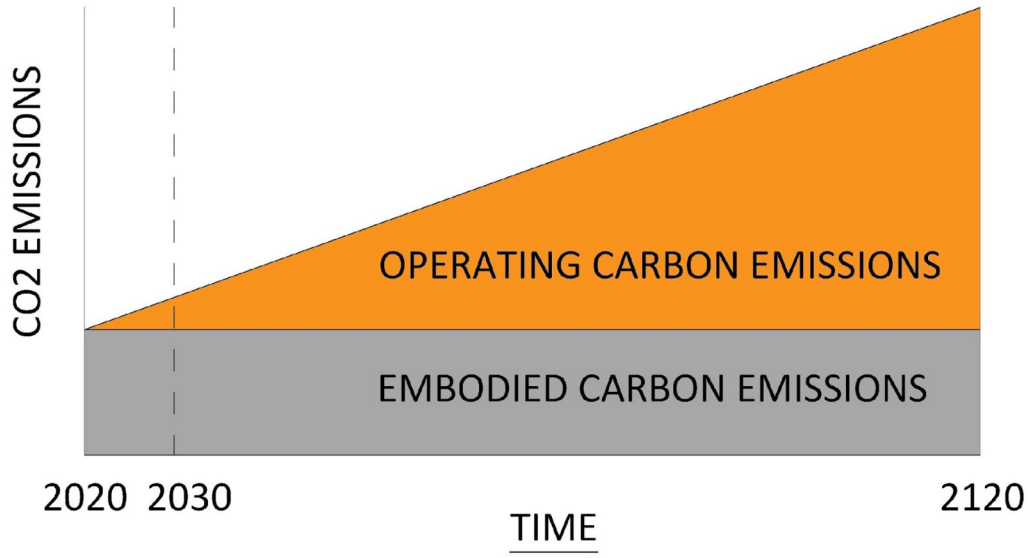
R-19.74

Water & Moisture Management



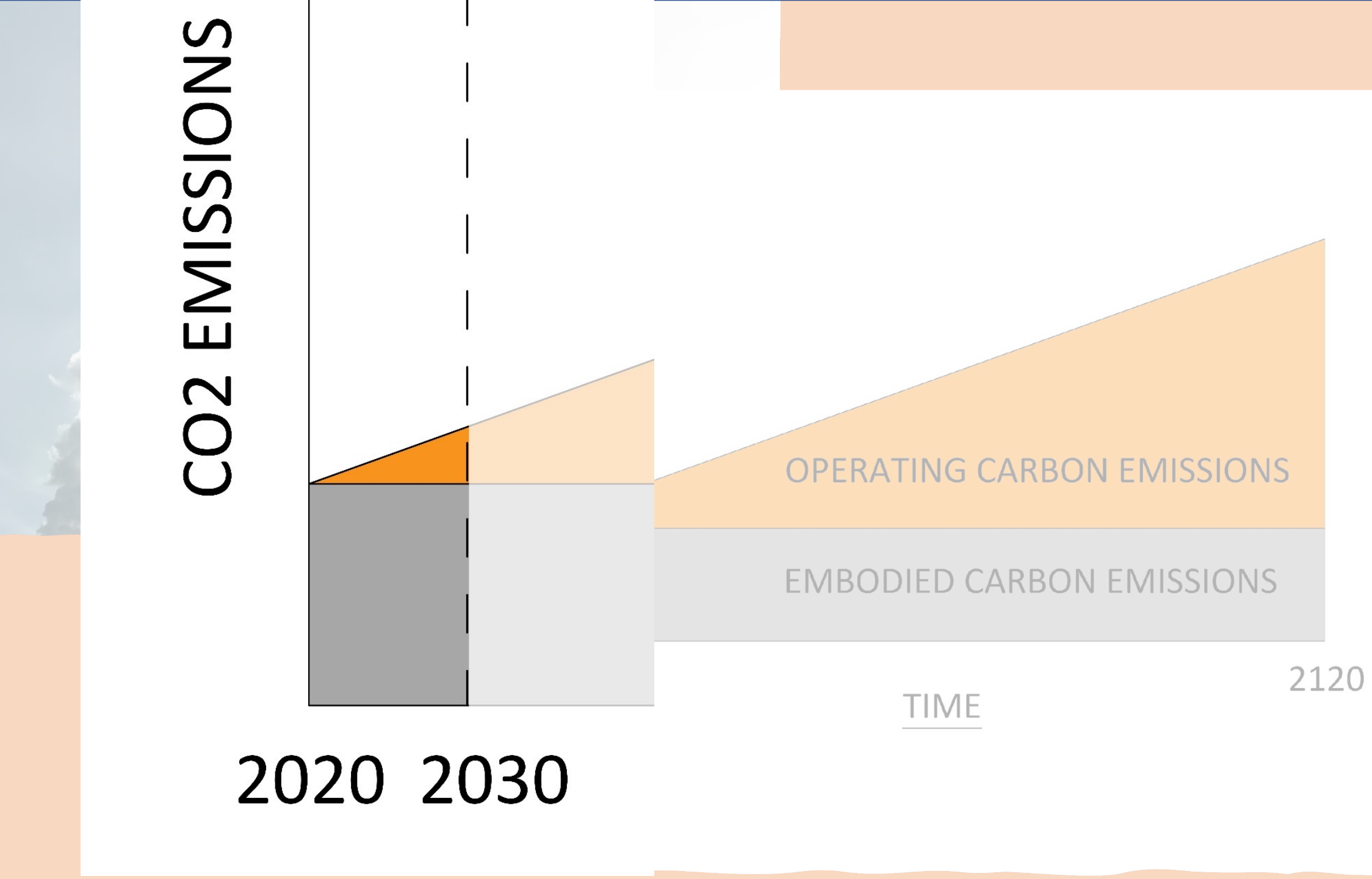
Windows & Exterior Doors



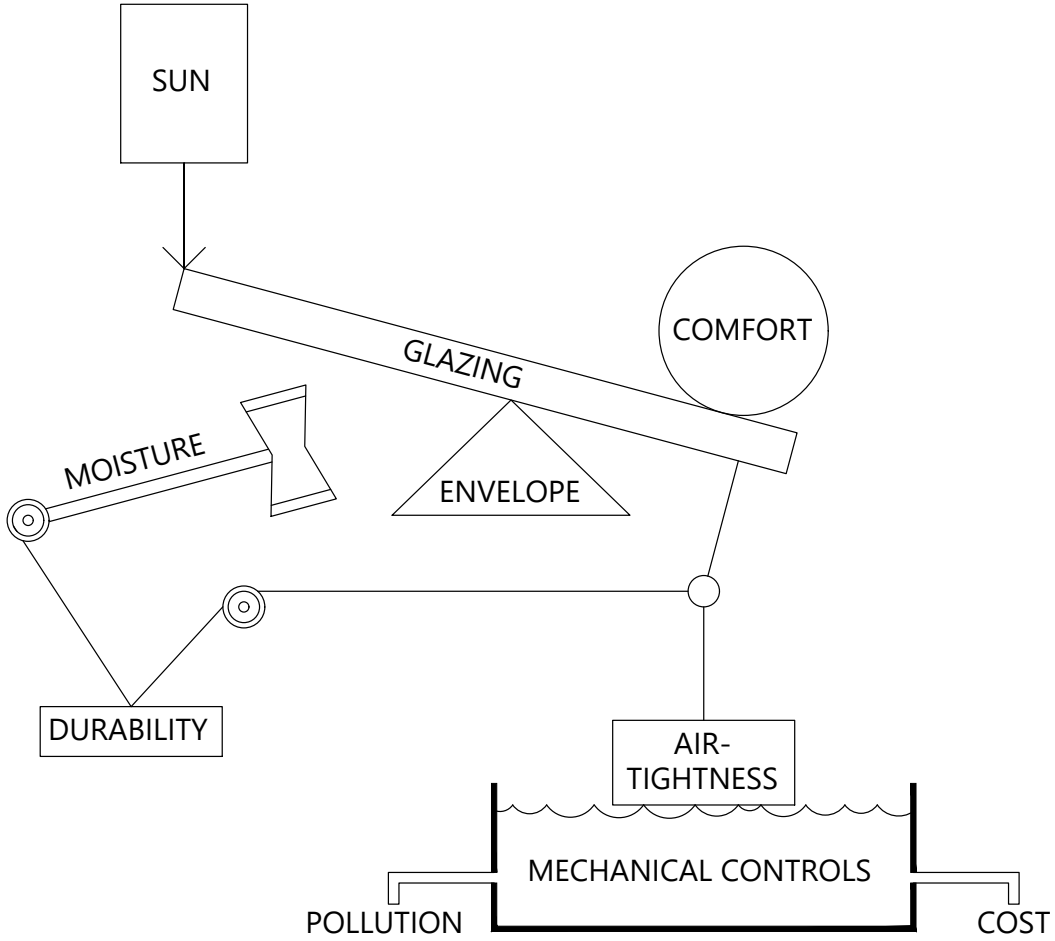


Materials

- Embodied Carbon – or Upfront Carbon Emissions
- Resource Efficiency
- Recycled Content
- Toxins & Indoor Air Quality


CO2 EMISSIONS
2020
2030
OPERATING CARBON EMISSIONS
EMBODIED CARBON EMISSIONS
2120
TIME

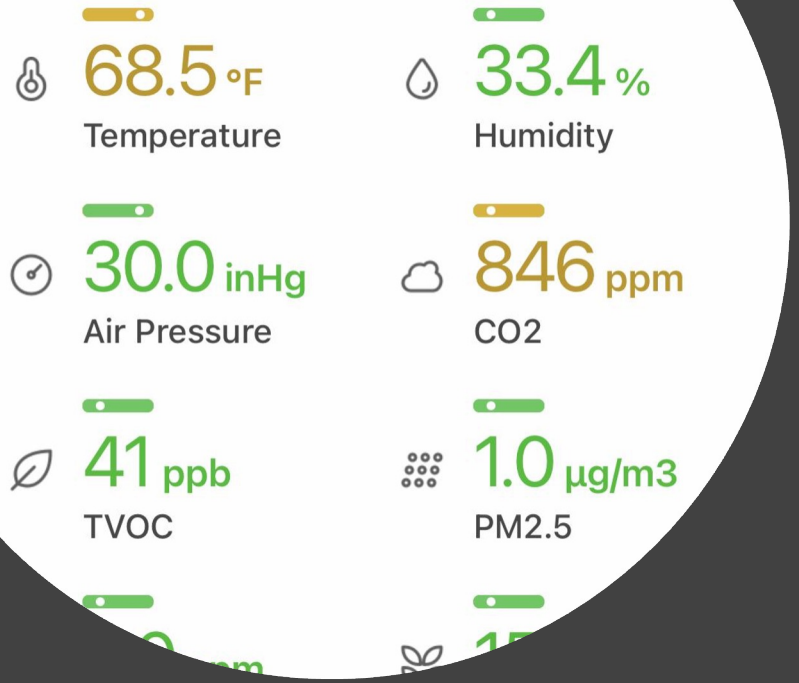
Mechanical Systems



Electricity and Lighting

- Reduce First
- Produce your own Energy

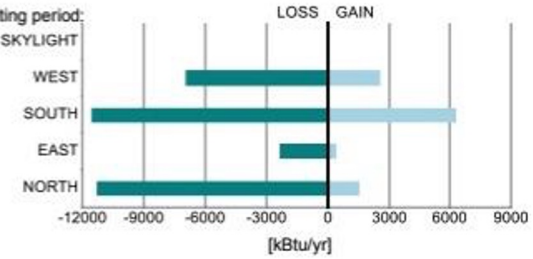
Verification & Client Education



BUILDING ELEMENTS

Windows

Average SHGC:	**0.33**
Average solar reduction factor heating:	**0.39**
Average solar reduction factor cooling:	**0.34**
Average U-value:	**0.361** Btu/hr ft² °F
Total glazing area:	**370.3** ft²
Total window area:	**560.8** ft²



the

Pretty Good House

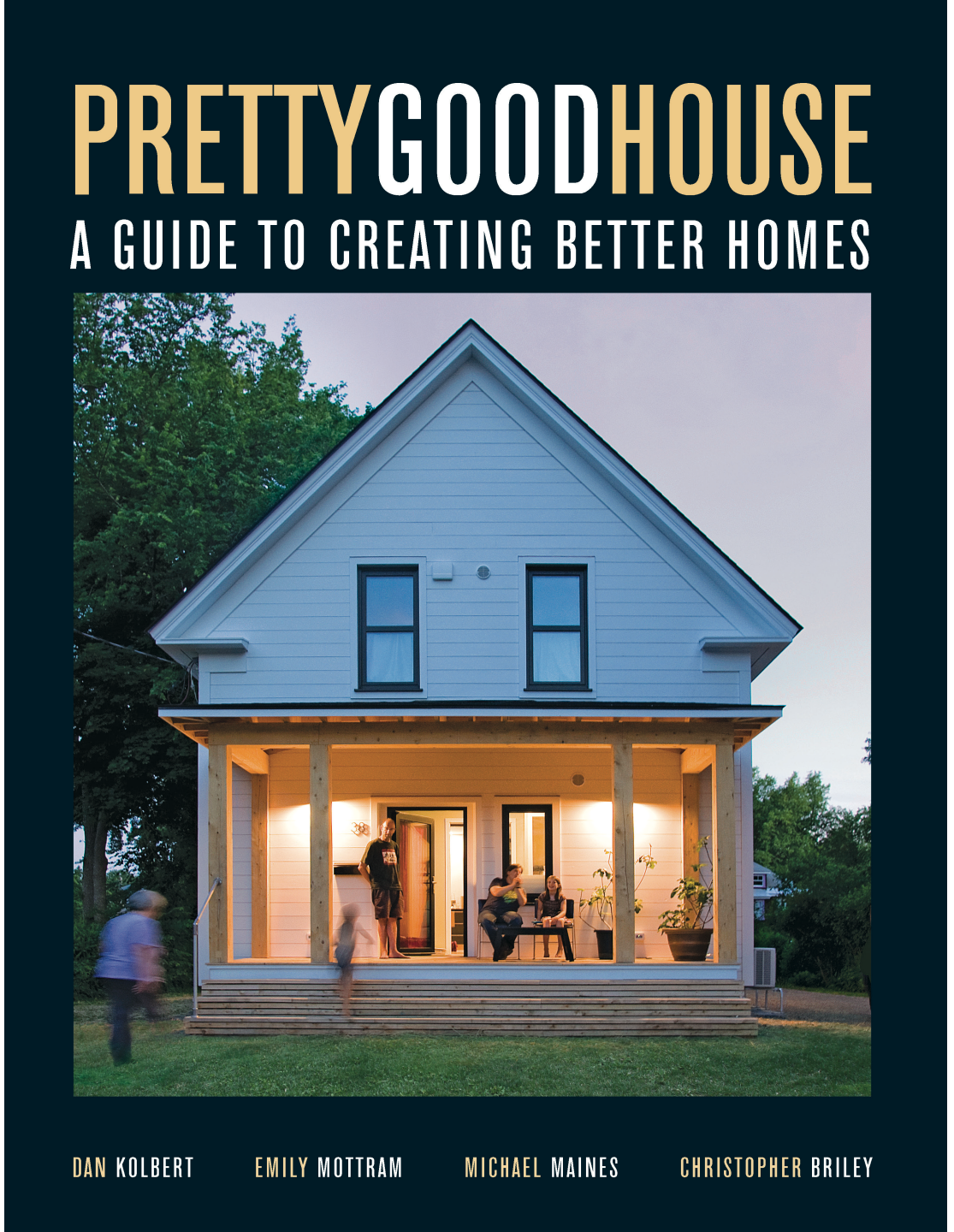
We wrote a book

A “Pretty Good” Offer

www.TauntonStore.com

code:

PGHEVENT



E-learning

We are launching a new continuing education course based on the PGH principles

We have a website

Pretty Good House provides a framework and guidelines to focus on the core issues that should be front and center when designing and building a high quality home or renovation.

About the name....

In southern Maine, there's a small group of building professionals that get together monthly to discuss building science. It sounds boring, I know, but truly it isn't. Food is brought in, beer is consumed, a blackboard is present and a topic is brought up for discussion. (topics like, high performance windows, venting cathedral ceilings, moisture migration in wall assemblies, slab on grade details, etc.) Since we are all peers, and colleagues (with egos, attitude, and a good sense of humor) the conversation is usually lively, informal and frankly all over the place. There's usually a moderator to keep everyone reined in and on topic. Every once in a while I have the pleasure of being that moderator, but that is only when builder, Dan Kolbert can't attend. Dan while on a rant once, expressed frustration with the status quo, and even more frustration with the various rating systems that had him jumping through many hoops to prove that his work was in fact "green" and energy efficient. As many can attest, these systems can be very costly in time and money, and in the case of many green projects, they aren't doing anything to advance the project. Rather they are simply certifying them. So Dan simply stated, "I just want to build a pretty good house."

- Chris Briley

We like discussion

List of BS+Beer and other building science groups + The BS+Beer Show

The EntreArchitect™ Community
ANNUAL MEETING
The International Conference for Small Firm Entrepreneur Architects
Austin, Texas · November 1-3, 2022
With support from Monograph

Lunch

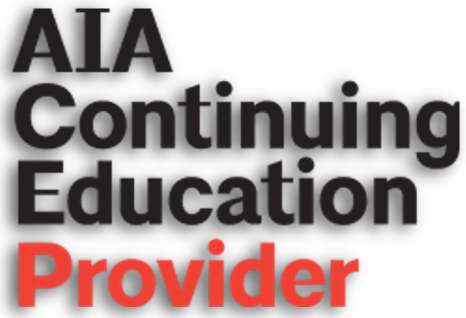
Thank you for Lunch.

Welcome to Session 2

FACTOR
Architecture & Engineering

Thank you for supporting Session 2.

AIA CES Provider Statement



McCarthy LePage Architects, PLLC is a registered provider of AIA-approved continuing education under Provider Number 400103574.
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AIA continuing education credit has been reviewed and approved by AIA CES. Learners must complete the entire learning program to receive continuing education credit. AIA continuing education Learning Units earned upon completion of this course will be reported to AIA CES for AIA members. Certificates of Completion for both AIA members and non-AIA members are available upon request.

Build Your Mental Wealth

How Improving Your Mental Health Can Promote Financial Wealth

Handouts

https://qrco.de/bdPaww

A Surprise Bonus from Therapy

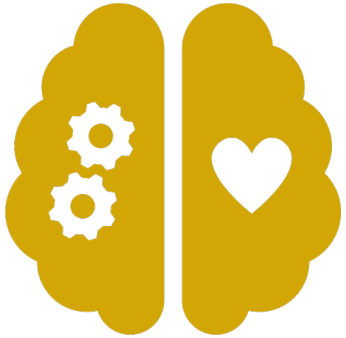
I am a financial planner, not a psychiatrist, but I do know that your net worth will rise to meet your self-worth only if your self-worth rises to accept what can be yours.

SUZE ORMAN,
author of ten consecutive *New York Times* best sellers about personal finance

The Psychology of Money

- Feelings of worthiness
- Thoughts about money
- Emotions around money
- Behaviors with money
- Relationship with money
- Financial relationships with others

My Money Story



The intrinsic relationship between mental health & financial health

Stressors of the Pandemic

- Concerns for health & safety of self & others
- Adjustments to working differently
- Less social support and community
- Dependent care—work-life balance challenges
- Financial fears & stress
- Racial injustice issues coming to the forefront
- Political divide and unrest
- Challenges managing uncertainty and change

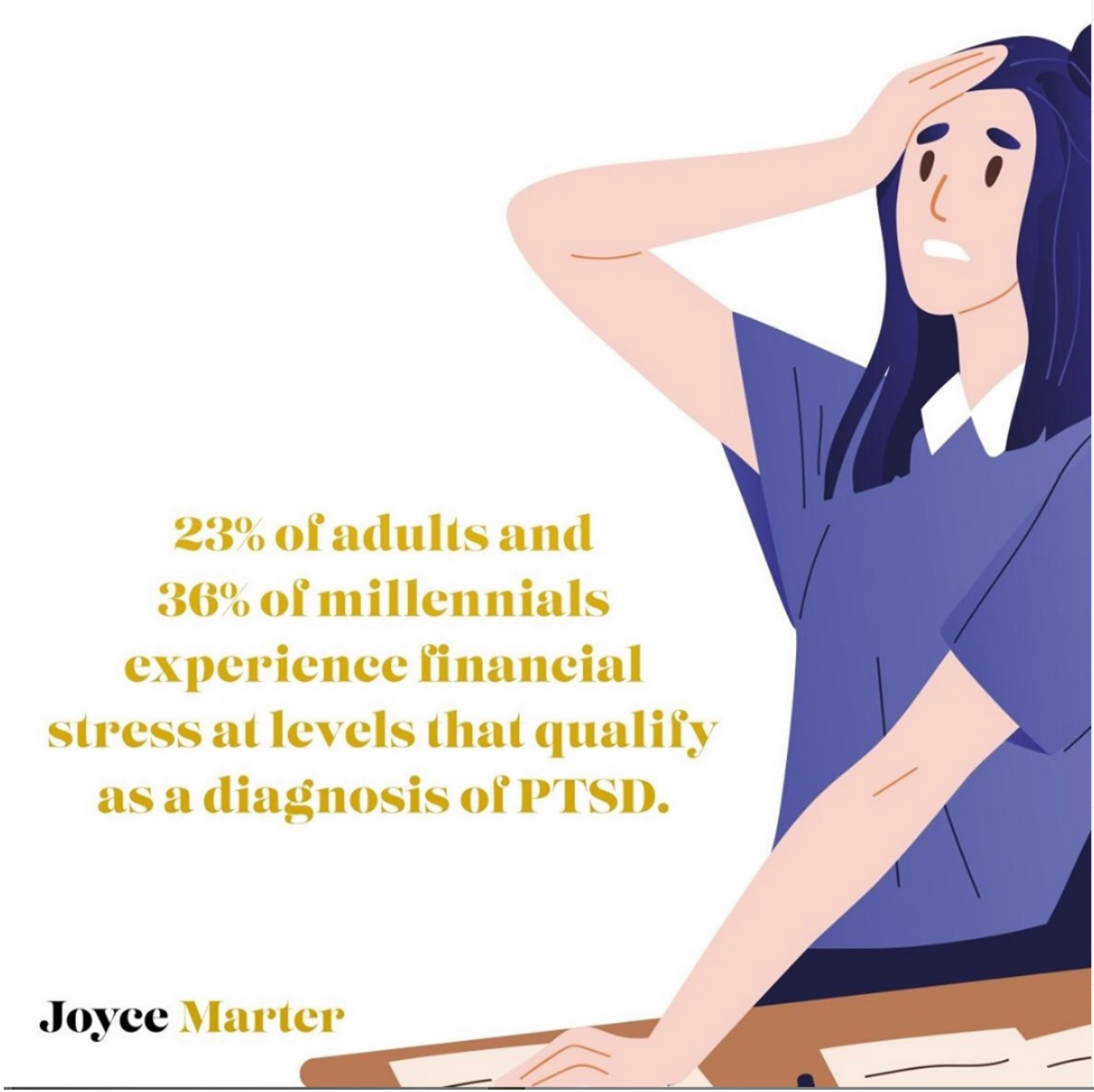
Reintegration Challenges

- Health anxiety
- Social anxiety
- Workload
- Office reintegration
- Clinical and functional burnout
- Great Resignation and Quiet Quitting

Mental Health Implications

- Grief and loss
- Increase in stress, anxiety and depression
- Increase in substance abuse
- Relationship conflict, abuse, violence
- PTSD/Trauma
- Increase in suicide rates

23% of adults and
36% of millennials
experience financial
stress at levels that qualify
as a diagnosis of PTSD.



Joyce Marter

Financial Traumas

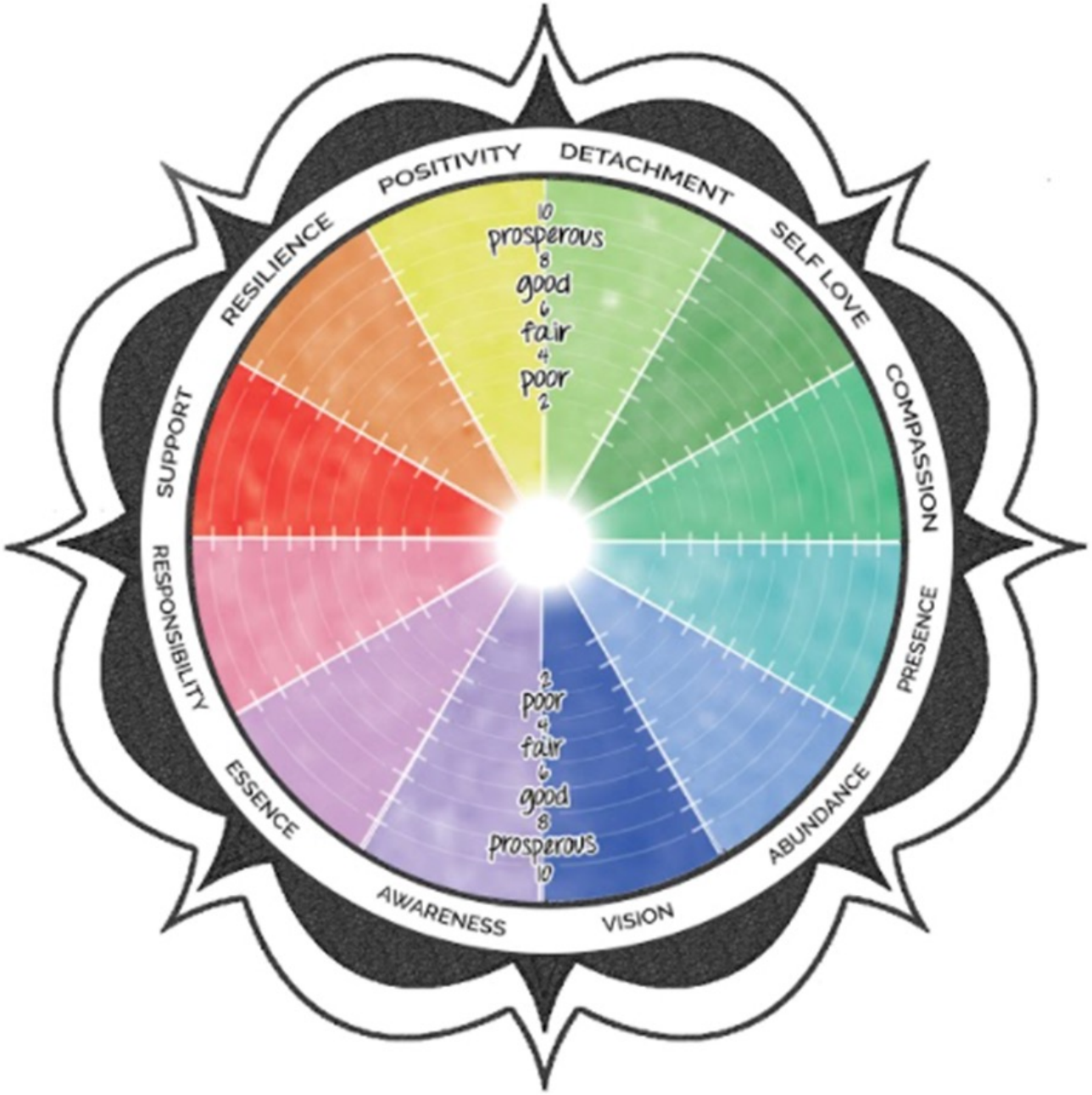
- Racism, discrimination, marginalization
- Poverty
- Unemployment
- Business closing
- Foreclosure, short sale
- Bankruptcy
- Theft
- Lawsuit
- Divorce, breakup
- Unexpected healthcare expenses

FEATURED ON
moneygeek
“
Financial distress accounts for 16 percent of suicides in the US and correlates with lower life satisfaction.
Joyce Marter

Mental Health Continuum

In Crisis	Struggling	Surviving	Thriving	Excelling
Absenteeism Exhausted	Depressed Tired Poor performance	Irritable Sad Trouble Sleeping	Performing Sleeping Well Eating normally	Energetic High performance Flow

We unconsciously recreate the familiar until we become aware, and we choose something better.



Twelve Mindsets for Success

#1 Abundance

"Long-lasting and pronounced success comes to those who renew their commitment to a mindset of abundance every minute of every hour of every day."

- Bryant McGill, Author & Human Potential Thought Leader

Scarcity vs Abundance

- Can be caused by fear
- Competing for available resources
- Rooted in limiting beliefs
- **Focused on what you don't have**

- Can be a result of gratitude
- Not competition involved
- Rooted in believing there is enough for everybody
- **Focused on believing in yourself**

Joyce Marter

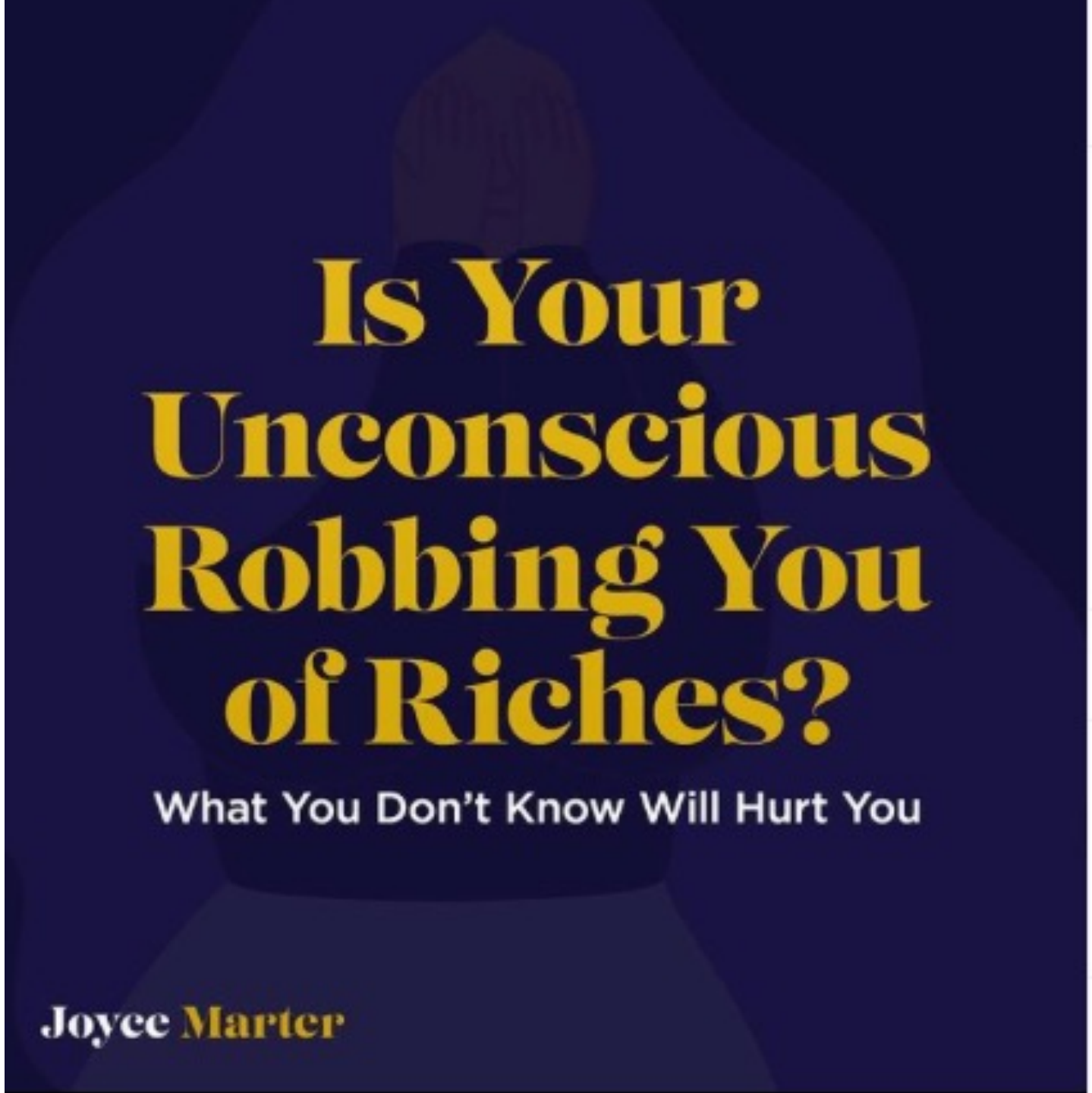
An Abundance Mindset Facilitates:

- Creativity
- Positivity and possibility
- Hope
- Openness
- Flexibility
- Empowerment
- Problem-solving
- Growth and expansion
- Collaboration

#2 Self-Awareness

"He who knows others is wise.
He who knows himself
is enlightened."

- Lao Tzu


Is Your Unconscious Robbing You of Riches?
What You Don't Know Will Hurt You
Joyce Marter

FEATURED ON Psychology Today
Are your mother's money beliefs making you buy ugly shoes?

#3 Responsibility

"Everything you do is based on the choices you make. It's not your parents, your past relationships, your job, the economy, the weather, an argument or your age that is to blame. You and only you are responsible for every decision and choice you make."

- Wayne Dyer, The Power of Intention

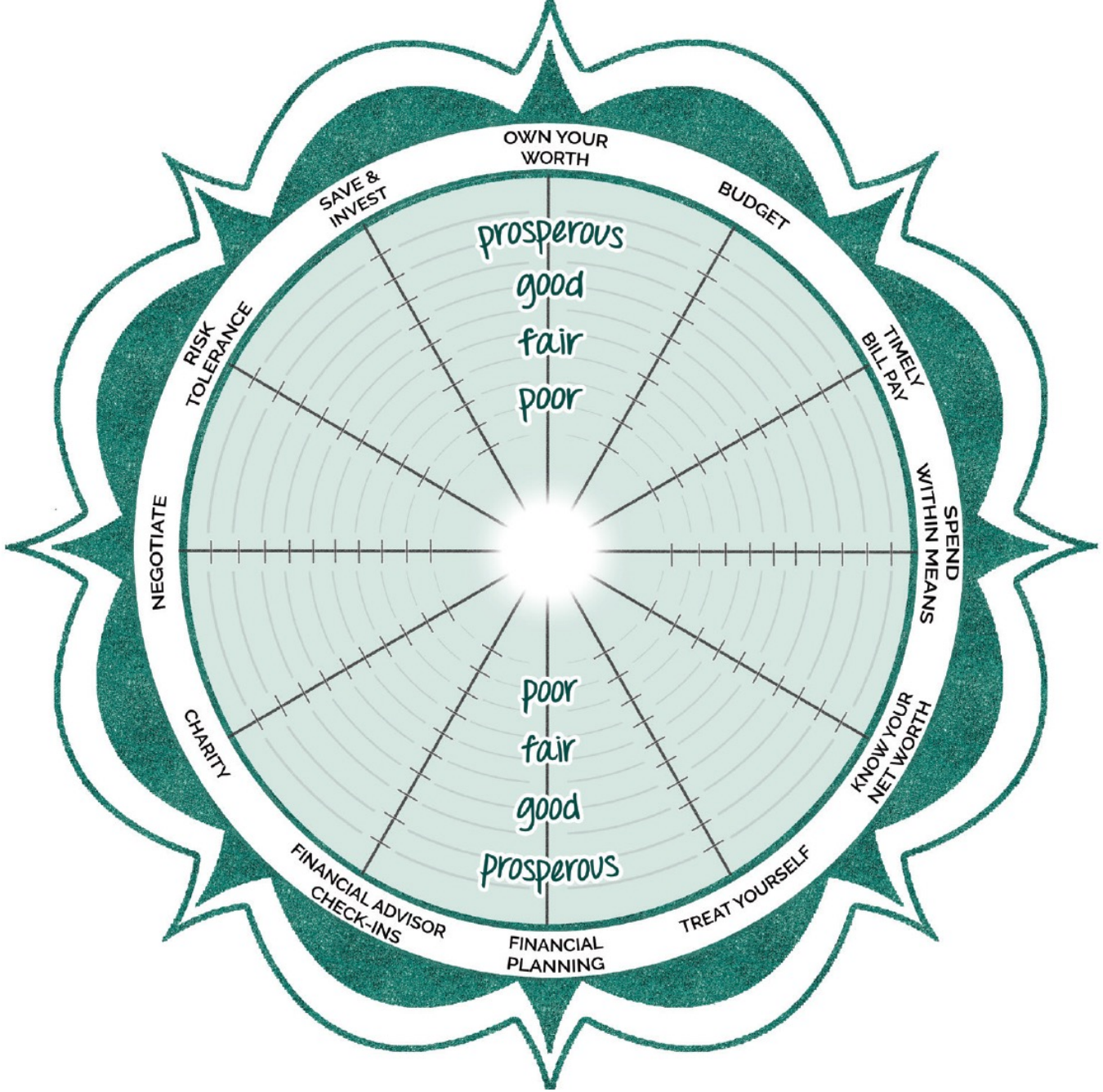
Success begins with an awakening, an honoring of the past for how it has shaped & molded us, and a choice to take responsibility for our path going forward.

Financial Literacy

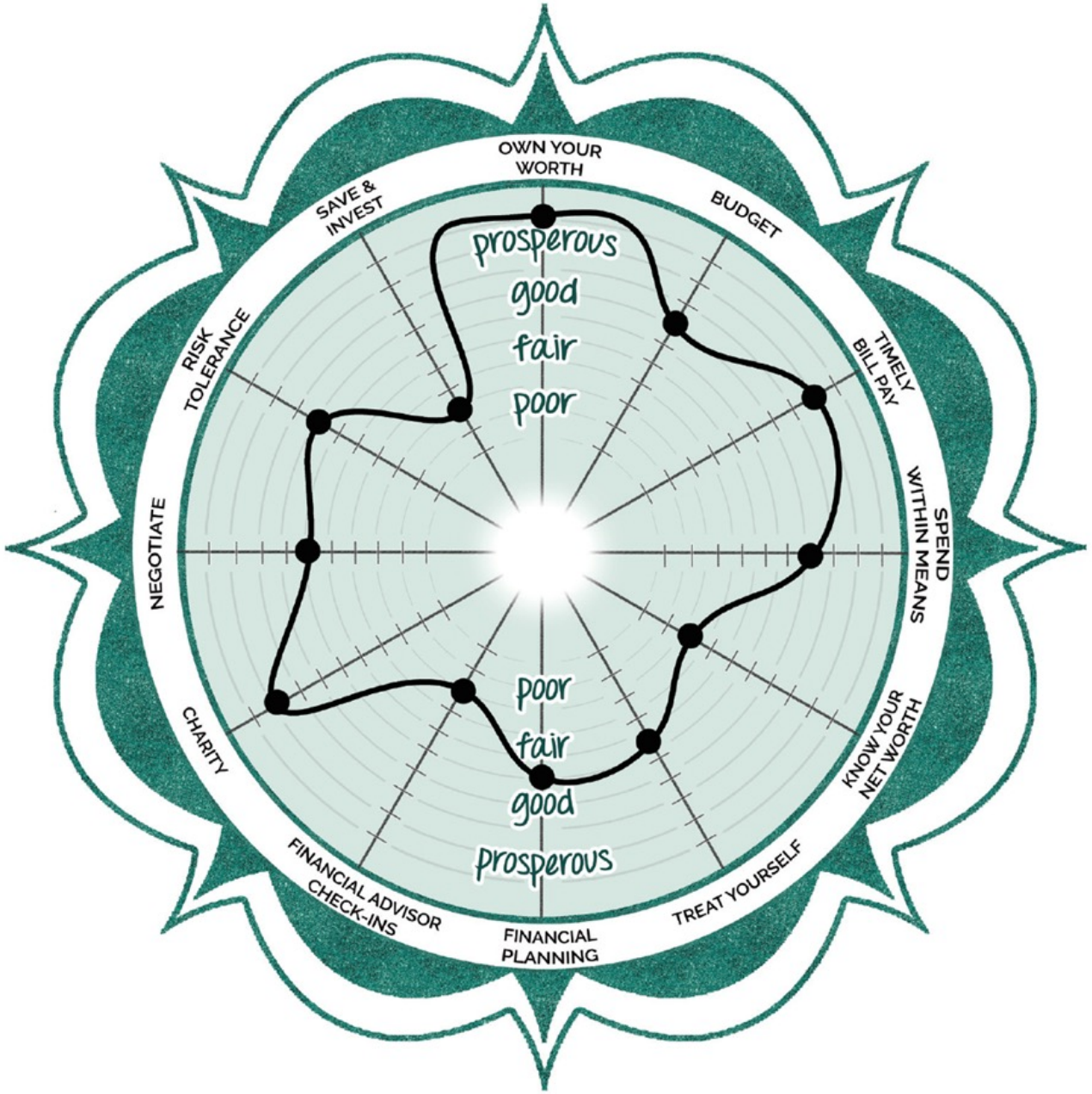
- Budgeting
- Banking
- Investing
- Reading financial statements and reports
- Understanding interest
- Understanding pros and cons of financial products including insurance

Improve Your Financial Relationships

- Strengthen Your Financial Communication
- Set Financial Boundaries with Assertiveness
- Be Aware of Financial Infidelity
- Understand the Role of Financial Codependency



The Financial Health Wheel



Sample Completed Financial Health Wheel

#4 Presence

"Be as least as interested in what goes on inside you as what happens outside. If you get the inside right, the outside will fall into place."

- Eckhart Tolle, The Power of Now

Apply Mindfulness to Finance

- Save and spend mindfully
- Tap into your intuition when negotiating or making financial decisions
- Respond consciously rather than react emotionally

A story about Penny & Prosperity

Sally

#5 Essence

"Whenever you feel superior or inferior to anyone, that is the ego in you."

-Eckhart Tolle

Healthy self-esteem is midway between Diva and Doormat

Ego & Money

- Detach from ego
- Align with purpose
- Imposter syndrome & perfectionism
- Embrace enoughness

Discover Your Worth

And See We are All Beggars on a Golden Bench

What's your golden bench?

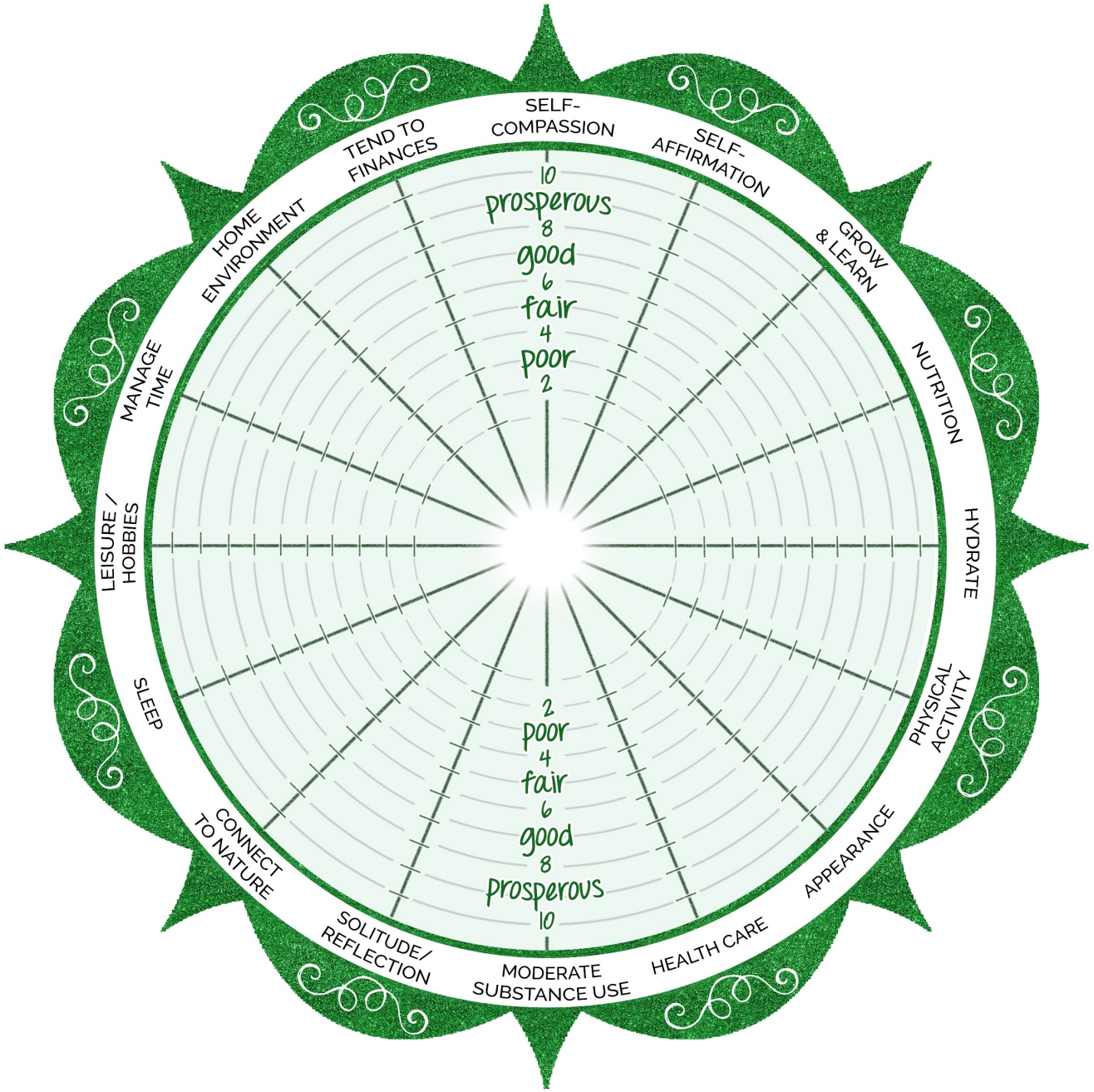
#6 Self-Love

“You can search throughout the entire universe for somebody who is more deserving of your love and affection than you are yourself, and that person is not to be found anywhere. You yourself, as much as anybody in the entire universe, deserve your love and affection.”

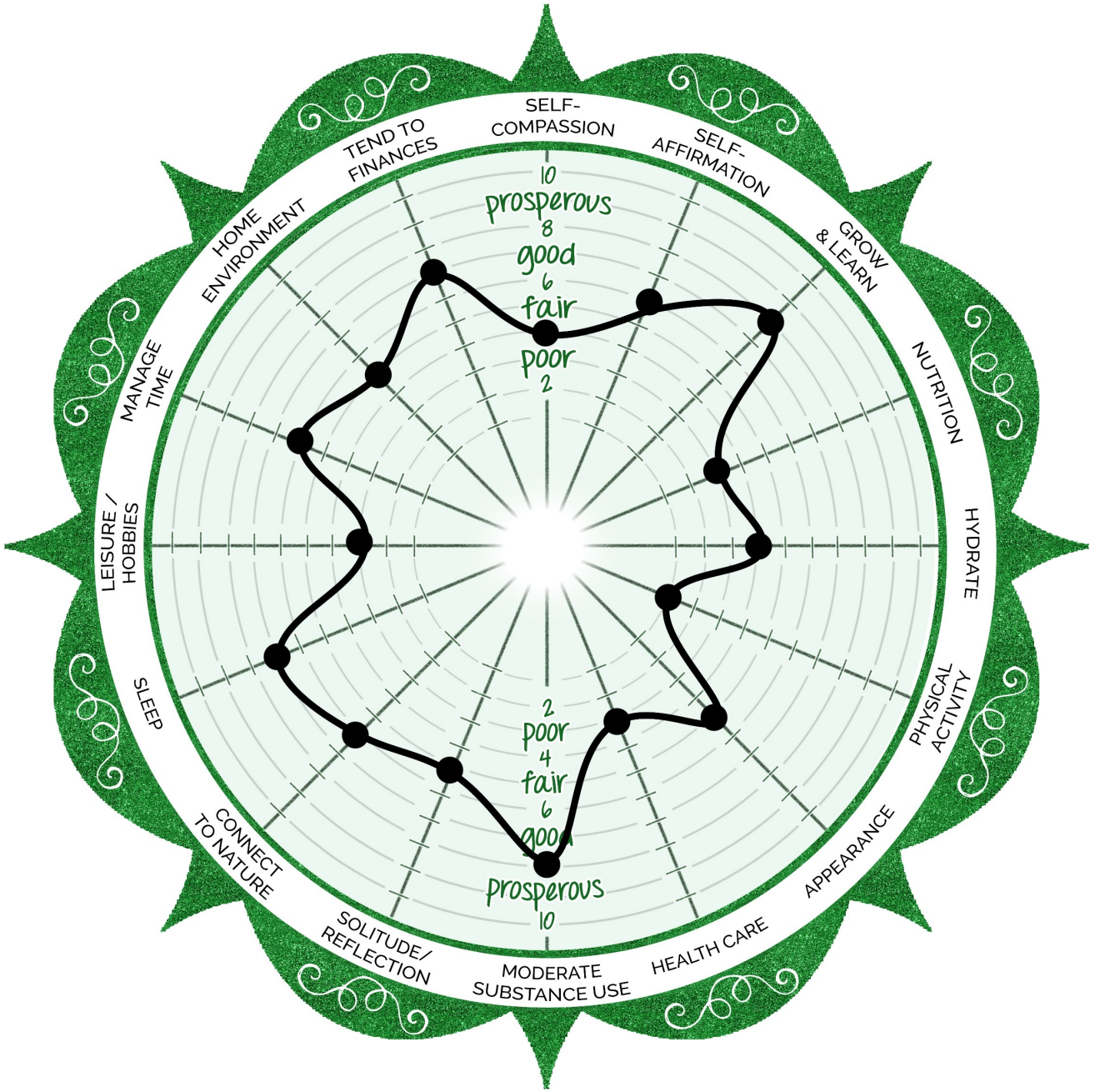
- Buddha

You must care enough about yourself to welcome the life that you deserve.

Having a healthy relationship with yourself is essential for happiness. Choose to be your own good parent, best friend, and greatest advocate.



Self-Love Wheel



Sample Completed Self-Love Wheel

7 Support

"Alone we can do so little,
together we can do so much."

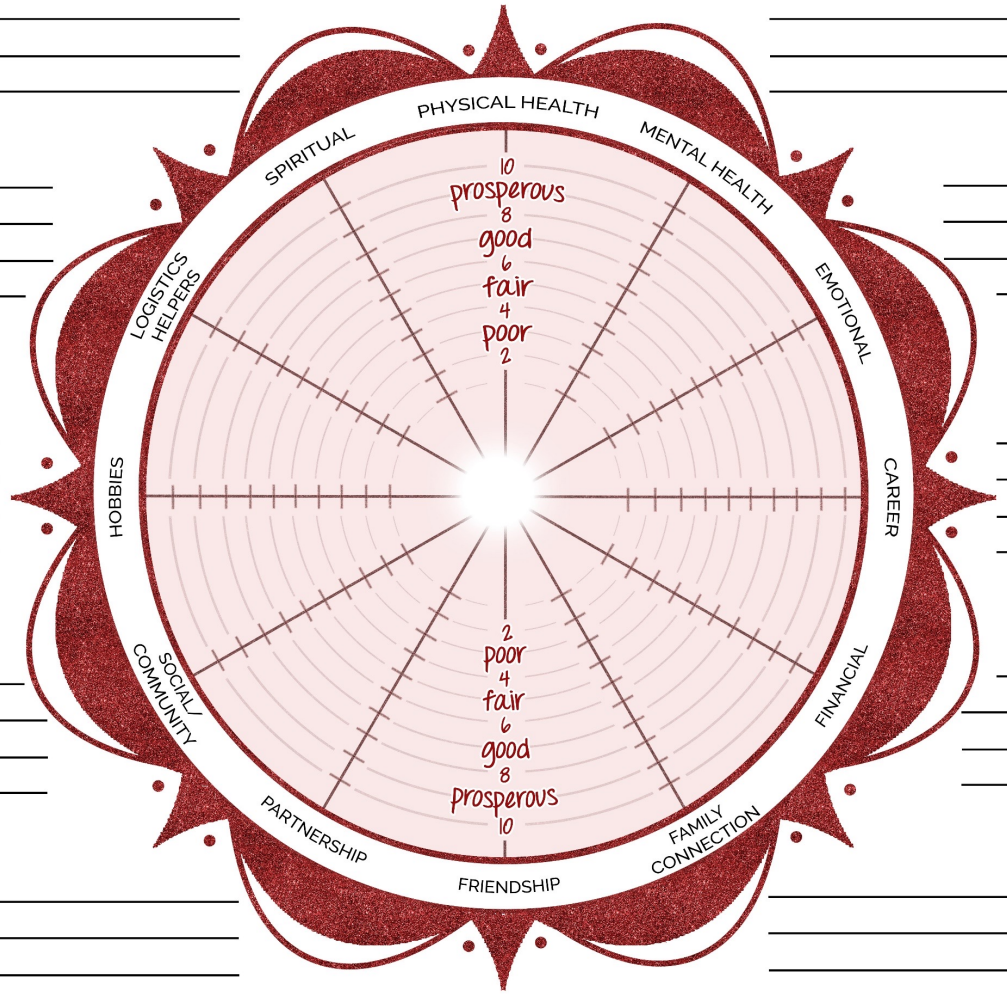
- Helen Keller

Barriers to Accessing Support

- Fear (difficulty trusting)
- Pride
- Shame or stigma
- Guilt
- Fear of imposition
- Low self-esteem, not feeling deserving
- Learned helplessness
- Hopelessness
- Loss of power and control (ego)
- Loss of credit (ego)
- Early life messages
- Expense
- Introversion or shyness
- Trauma

Create a Financial Board of Advisors

- Financial Planner
- Accountant
- Attorney
- Accountability Partner
- Counselor, Therapist or Coach
- 12-Step Support: Debtors Anonymous,
- Underearners Anonymous, Spenders Anonymous



Support Wheel

PCP (not great)
Dentist
Chiropractor

Meditation group
Spiritual advisor
Volunteer group

Therapist
Psychiatrist

Childcar provider
Carpool
Partner

Therapist
BFF Sue

Running group
Book club

Mentor
Supervisor
Career counselor

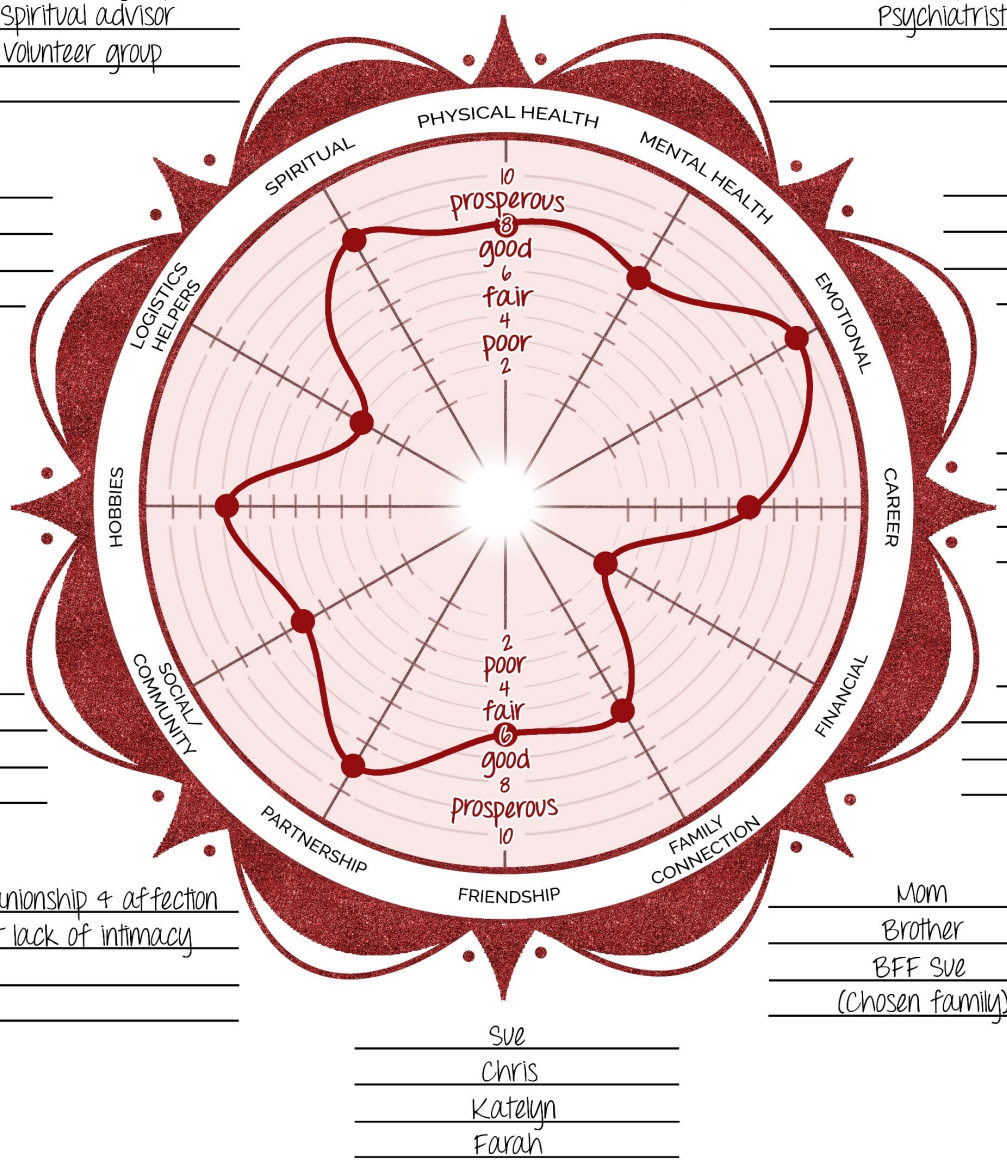
Moms group
Neighborhood

(none)

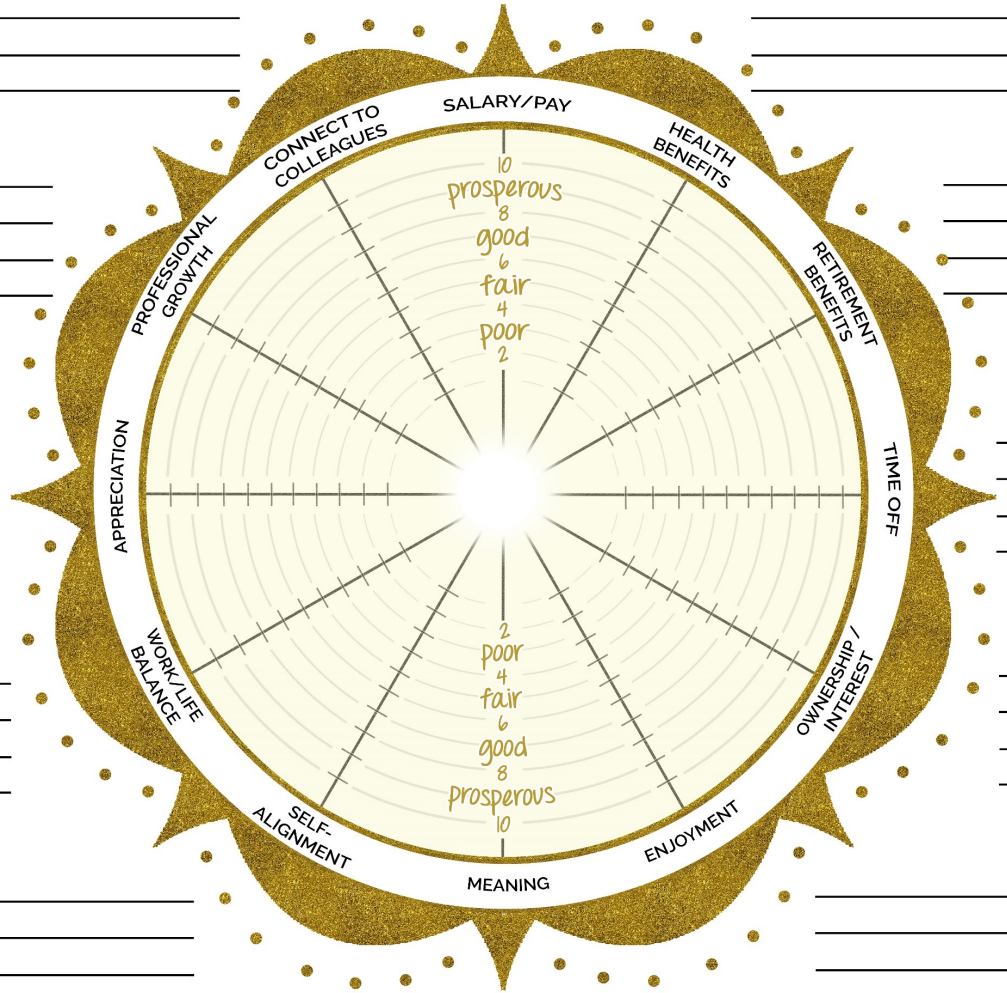
Companionship & affection
but lack of intimacy

Mom
Brother
BFF Sue
(Chosen family)

Sue
Chris
Katelyn
Farah



Sample Completed Support Wheel



Workplace Satisfaction Wheel

#8 Compassion

"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel."

- Maya Angelou

FEATURED ON LIVE BOLDLY

When you have more, you can help more.

Love is the
currency of life

#9 Vision

"First say to yourself what you would be; and then do what you have to do."

- Epictetus

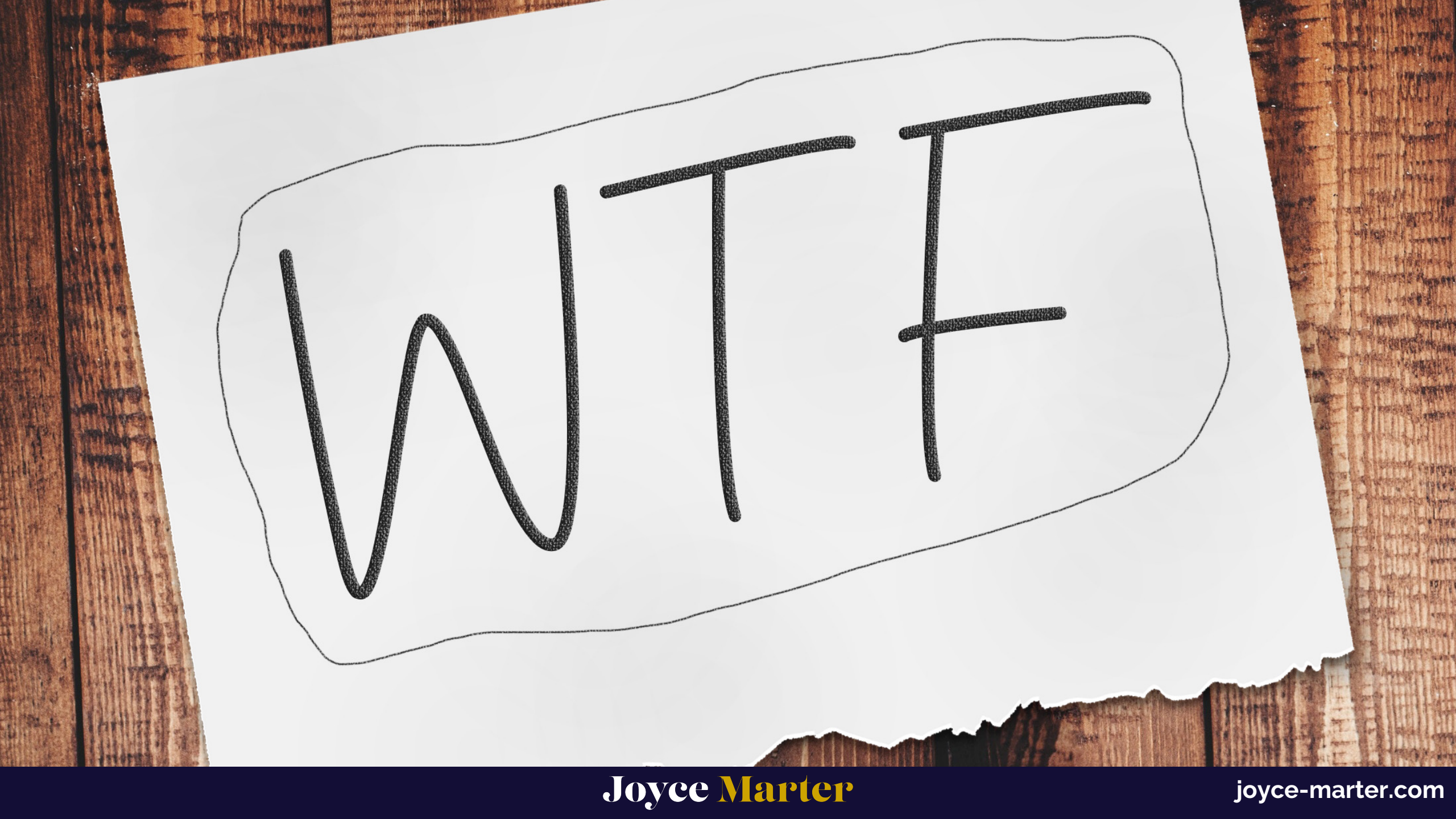
Envisioning & Planning

- Participate in Career Counseling or Coaching
- Leverage Professional Association Membership
- Utilize Mentoring
- Create a Vision Board
- Write Out a 1-3-5 Year Plan
- Prioritize work/life balance

#10 Positivity

"A man is but the product of his thoughts...what he thinks, he becomes."

- Mohandas Gandhi


WTF

When you refuse to believe something is impossible, it becomes possible.

Madame Tussauds

Change Your Language

- "I don't" to **"I do"**
- "I won't" to **"I will"**
- "I can't" to **"I can"**
- "I'm not" to **"I am"**

SITUATION	THOUGHT	EMOTION	BEHAVIOR	ALTERNATE THOUGHT
Your coworker received the promotion instead of you.	“I suck.”	Anger, sadness, shame	Sulky and passive-aggressive	“There will be a better opportunity for me in the future.”

Embrace the Power of Negotiation

- Everything is negotiable:
  - Contracts with contractors and service providers
  - Leases
  - Purchases
- Look for win-win
  - Solving problems

#10 Detachment

"Feelings are waves of energy which we can choose to surf, rather than allowing them to overcome us."

- Arlene Englander

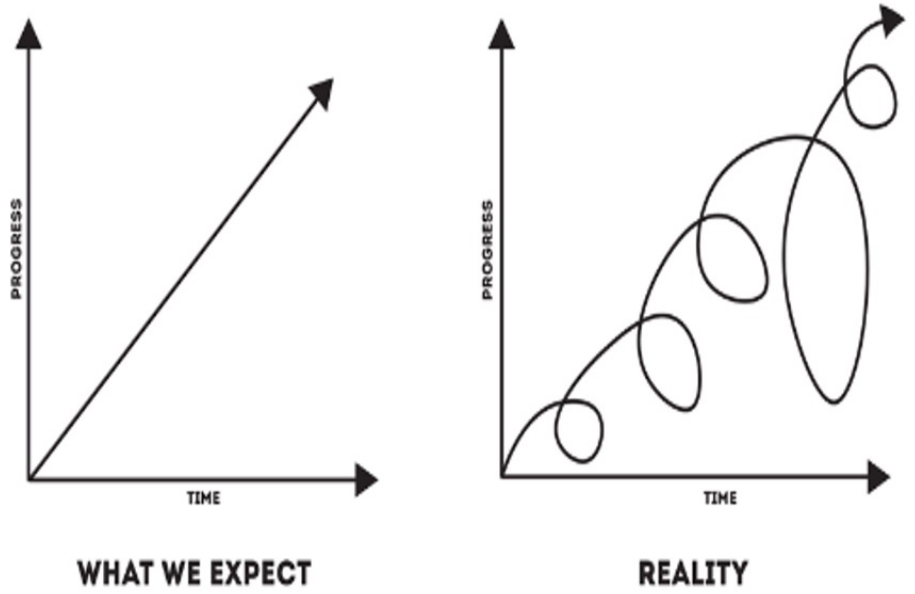
Detach From:

- Your own negative emotions like fear, anxiety, anger and sadness
- The negative emotions of others
- Expectations
- Outcome (embrace uncertainty)
- Risk

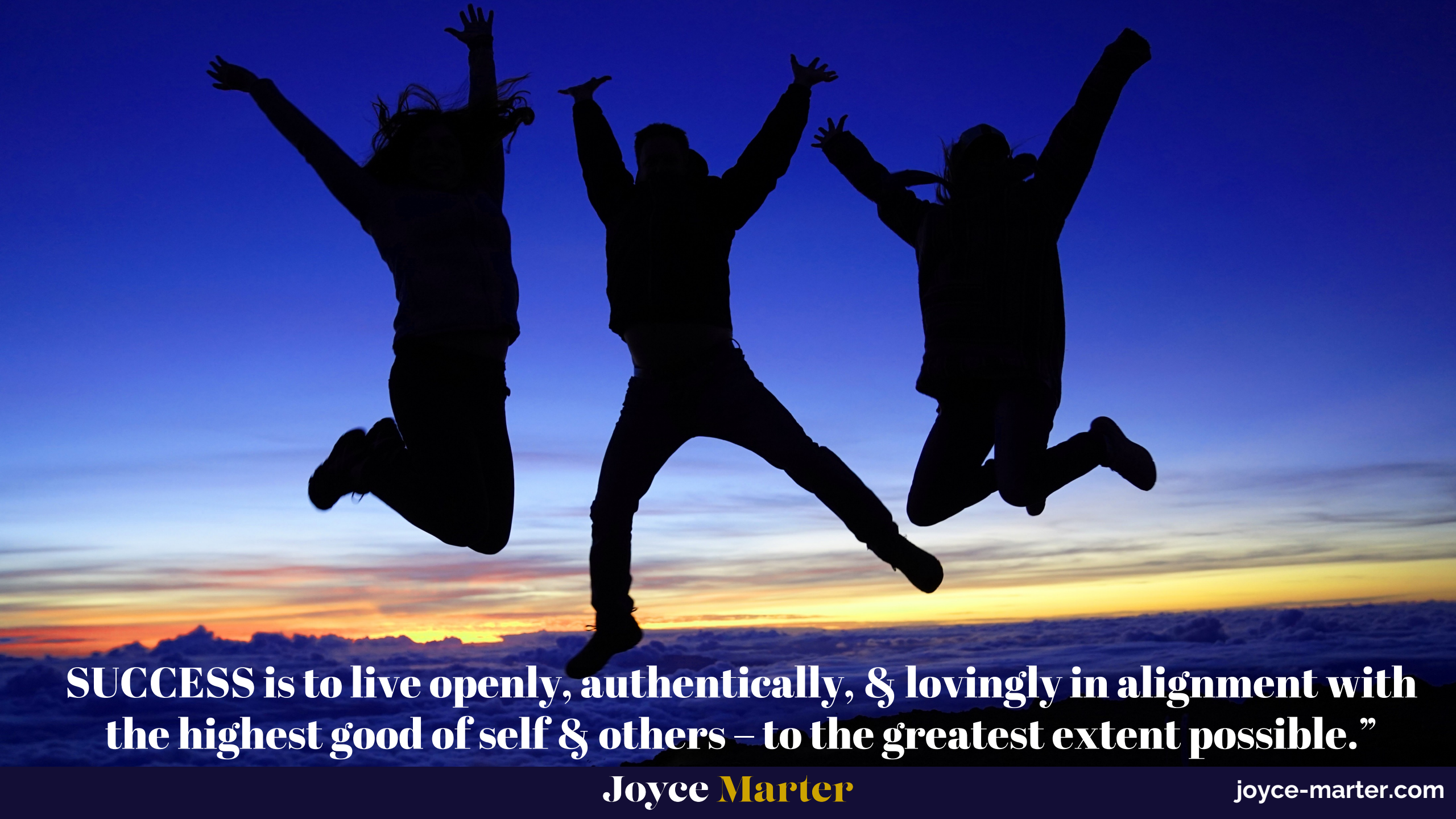
#12 Resilience

"Life will give you whatever experience is most helpful for the evolution of your consciousness."

- Eckhart Tolle



FEATURED ON
weightwatchers reimagined
“
Resilience is the ability to fully engage in life, recover from challenges, and increase the capacity to thrive in the future.
Joyce Marter


SUCCESS is to live openly, authentically, & lovingly in alignment with the highest good of self & others – to the greatest extent possible."
Joyce Marter
joyce-marter.com

Thank You!

www.joyce-marter.com
joyce@joyce-marter.com

Joyce_Marter

Joyce Marter

Joyce.Marter

Joyce Marter

JoyceMarterLCPC

Joyce_Marter

Joyce Marter

SCAN ME

Joyce Marter

The EntreArchitect™ Community
ANNUAL MEETING
The International Conference for Small Firm Entrepreneur Architects
Austin, Texas · November 1-3, 2022
With support from Monograph

FACTOR

Architecture & Engineering

Afternoon Break with Stix + Brix

EntreArchitect™ Honor Awards

Thank you for supporting our Honor Awards.

EntreArchitect™ Honor Awards

EntreArchitect™ Honor Awards

The Entrepreneur Architect Honor Award

EntreArchitect™ Honor Awards

Marica McKeel

Studio MM

The Entrepreneur Architect Honor Award

EntreArchitect™ Honor Awards

The EntreArchitect Community Award

EntreArchitect™ Honor Awards

Jeff Echols

EntreArchitect

The EntreArchitect Community Award

EntreArchitect™ Honor Awards

The EntreArchitect Lifetime Achievement Award

EntreArchitect™ Honor Awards

Steve L. Wintner

Management Consulting Services

The EntreArchitect Lifetime Achievement Award

The EntreArchitect™ Community
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Group Photo

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The International Conference for Small Firm Entrepreneur Architects
Austin, Texas · November 1-3, 2022
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Honor Awards Celebration

FACTOR

Architecture & Engineering

EntreArchitect™

CONTEXT & CLARITY

CONVERSATION

with

JEFF ECHOLS

Live at **The EntreArchitect Community** Facebook group every weekday at 4:00 PM E.T.

The EntreArchitect™ Community
ANNUAL MEETING
The International Conference for Small Firm Entrepreneur Architects
Austin, Texas · November 1-3, 2022
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End of Day 1

Welcome to Day 2

Thank you for your support as Title Sponsor.

The EntreArchitect™ Community
ANNUAL MEETING
The International Conference for Small Firm Entrepreneur Architects
Austin, Texas · November 1-3, 2022
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Thank you for breakfast.

Welcome to Session 3

Gābl Media

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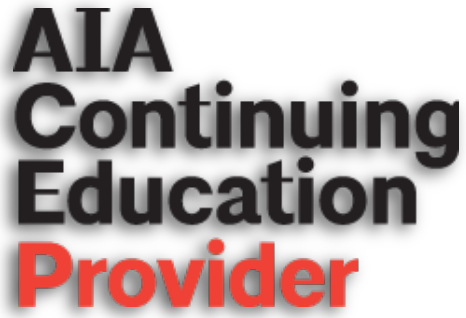

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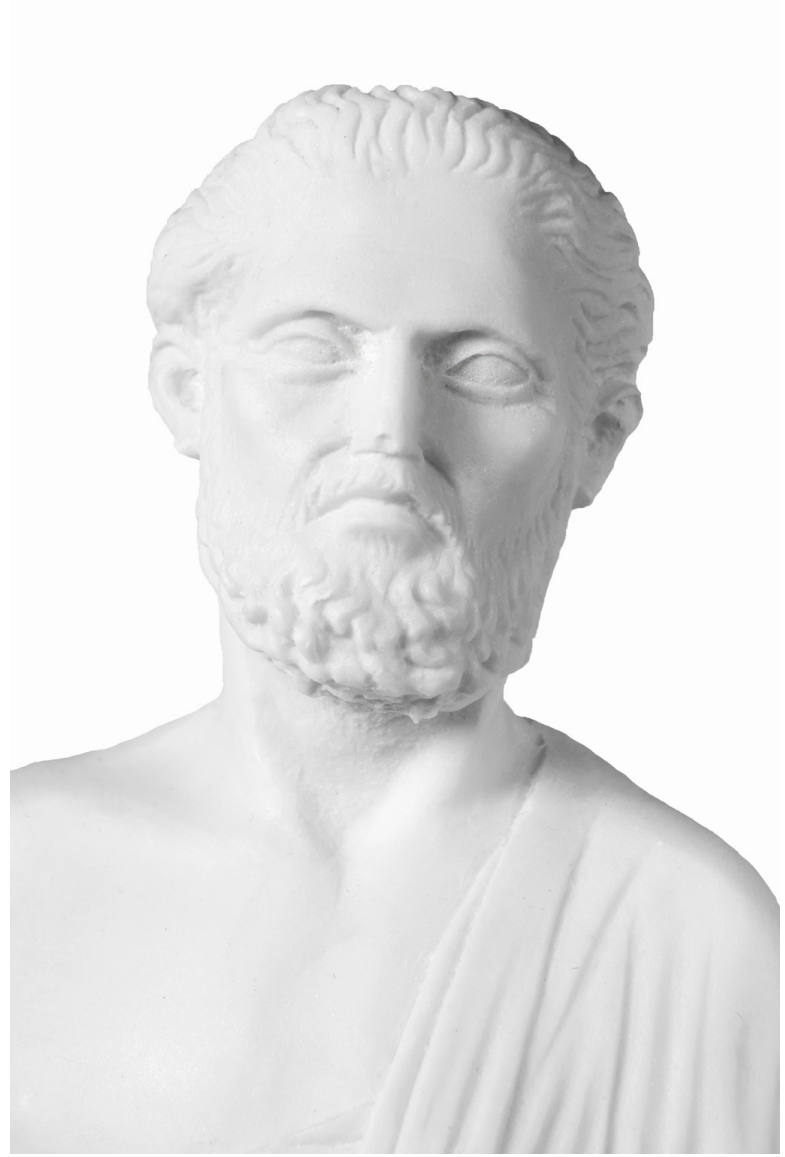

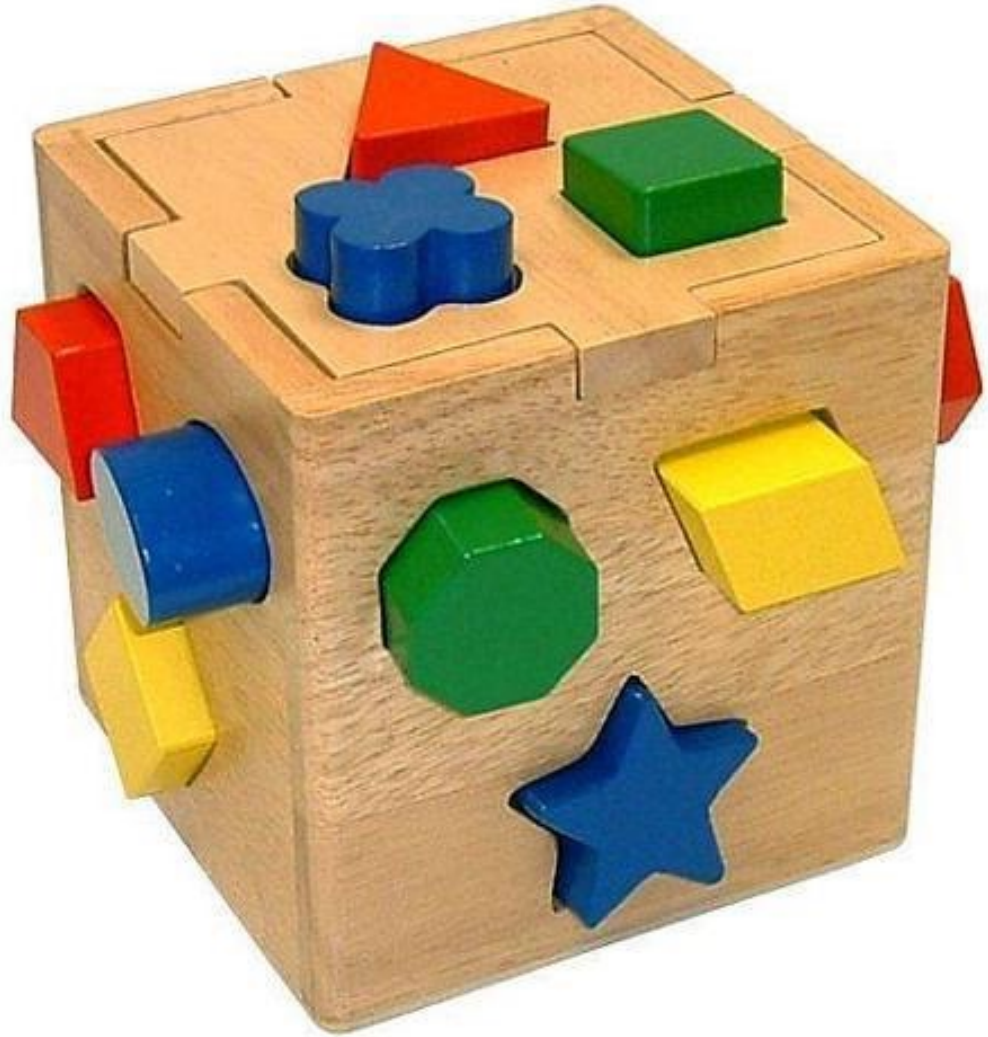

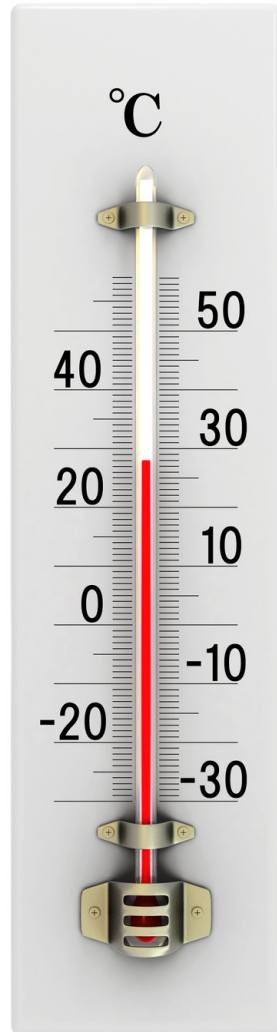
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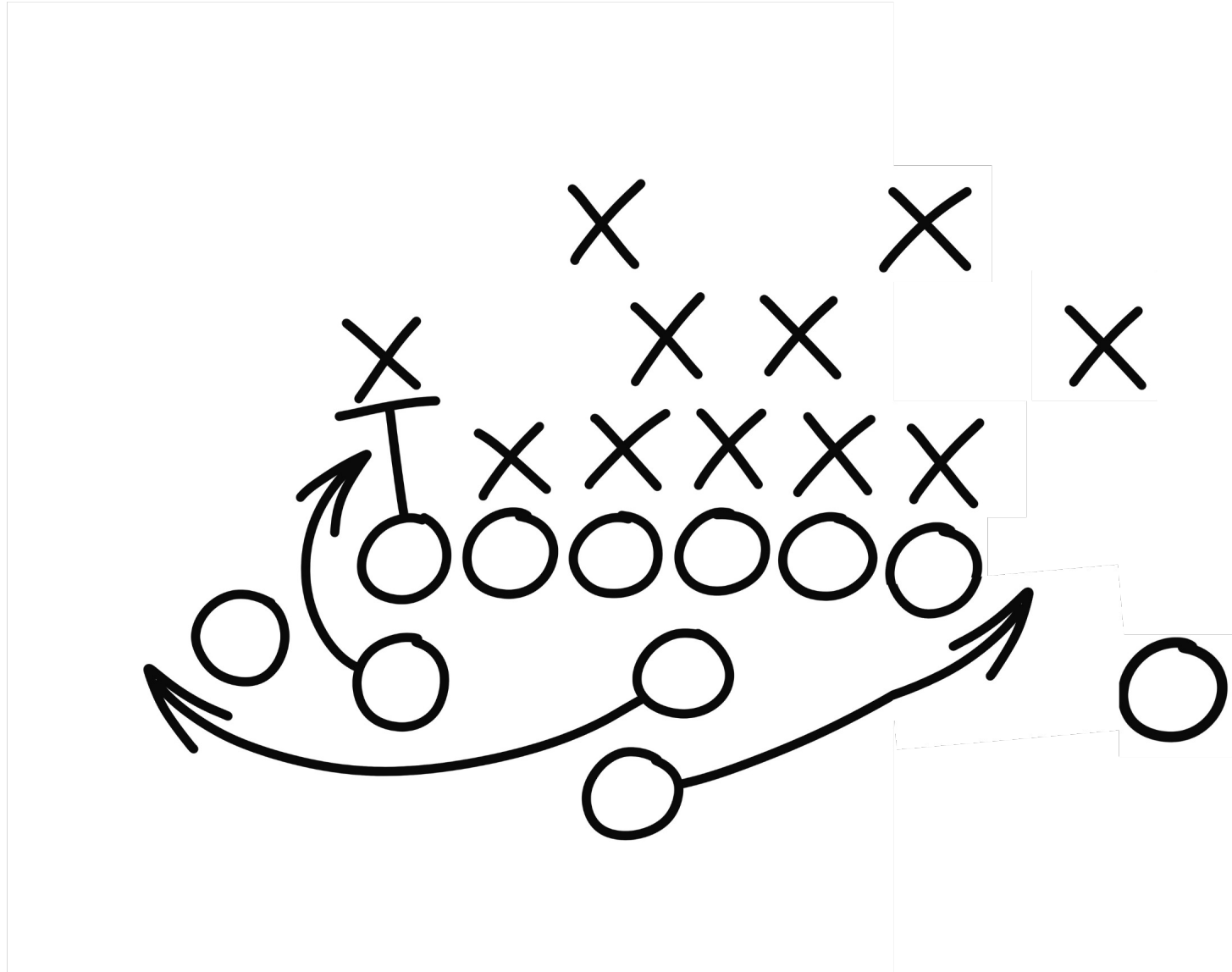
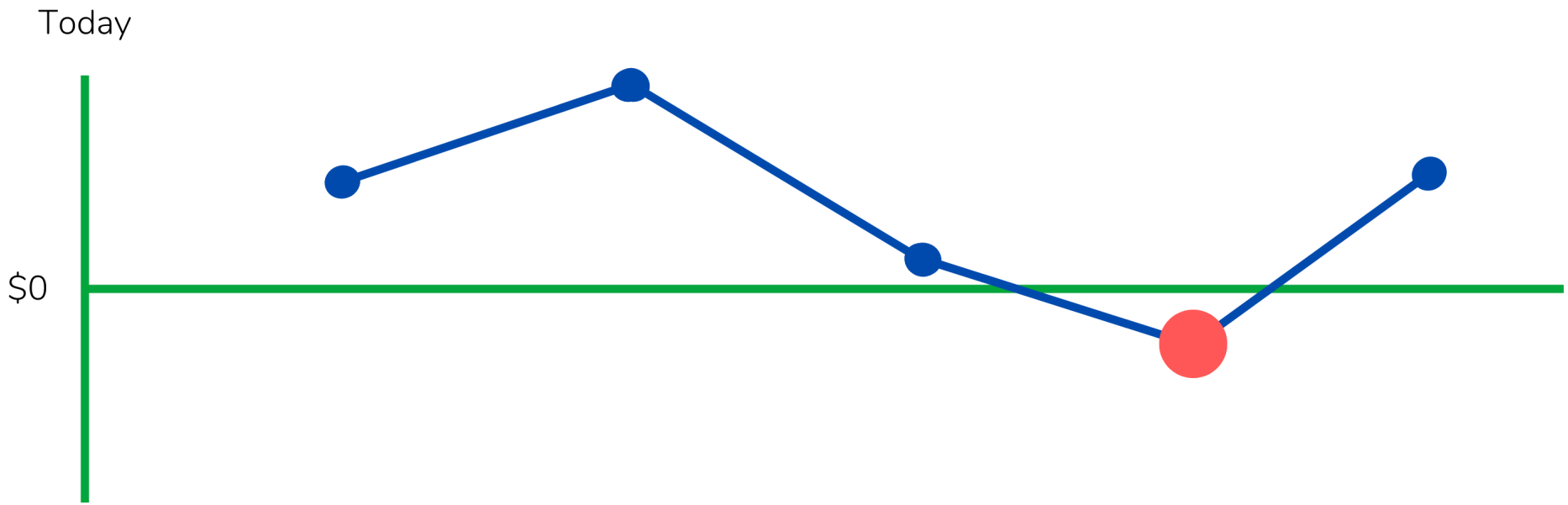
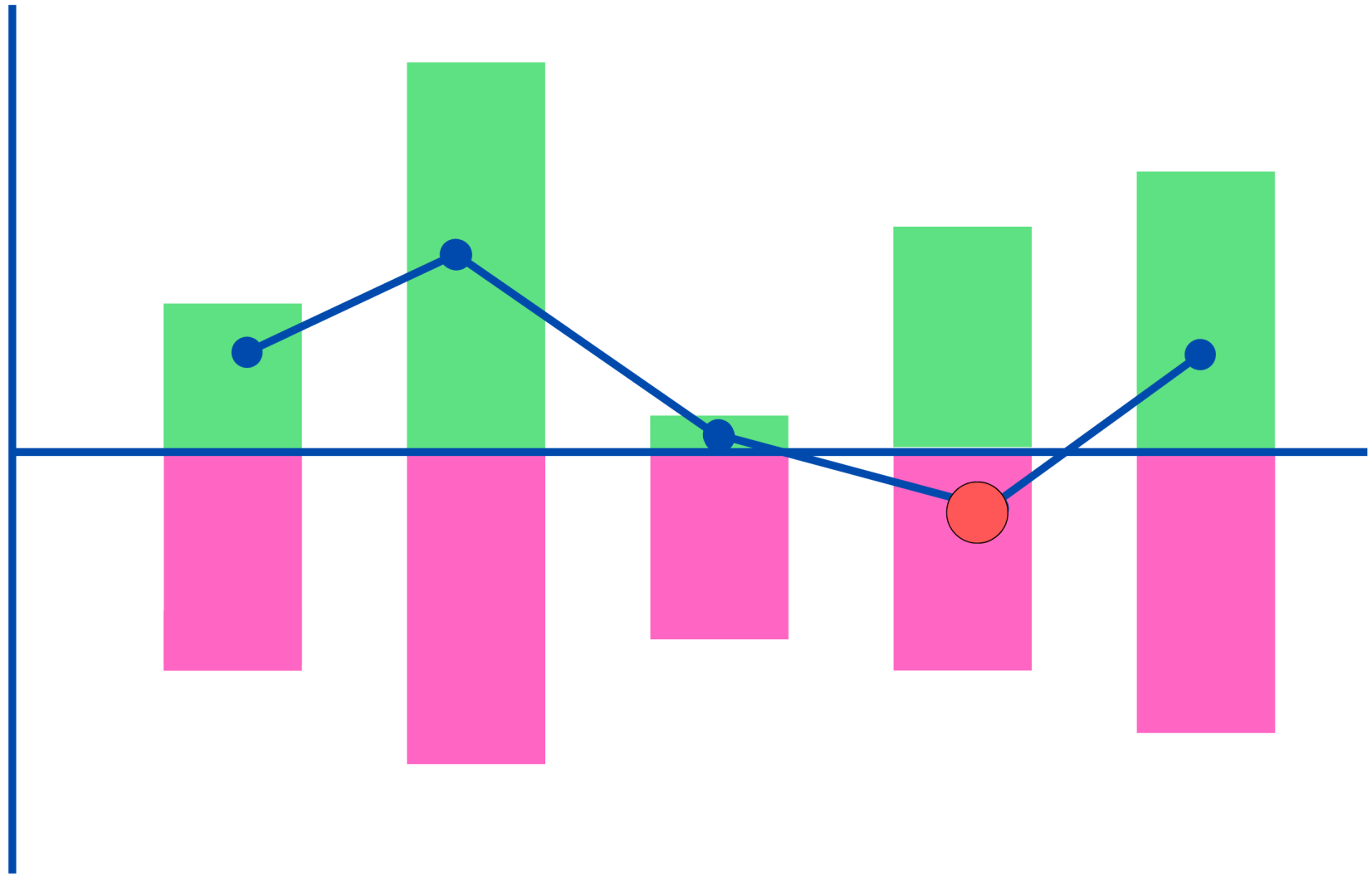
SOLO
A STAR WARS STORY
IN CINEMAS THURSDAY MAY 24
A LUCASFILM LTD. PRODUCTION "SOLO: A STAR WARS STORY" ALDEN EHRENREICH WOODY HARRELSON EMILIA CLARKE DONALD GLOVER
THANDIE NEWTON PHOEBE WALLER-BRIDGE JOONAS SUOTAMO AND PAUL BETTANY JOHN WILLIAMS JOHN POWELL INDUSTRIAL LIGHT & MAGIC
GLYN DILLON DAVID CROSSMAN PIETRO SCALIA, ACE NEIL LAMONT BRADFORD YOUNG, ASC. LAWRENCE KASDAN JASON McGATLIN PHIL LORD CHRISTOPHER MILLER
KATHLEEN KENNEDY, p.g.a. ALLISON SHEARMUR, p.g.a. SIMON EMANUEL, p.g.a. JONATHAN KASDAN & LAWRENCE KASDAN RON HOWARD
LUCASFILM
StarWarsUK #HanSolo

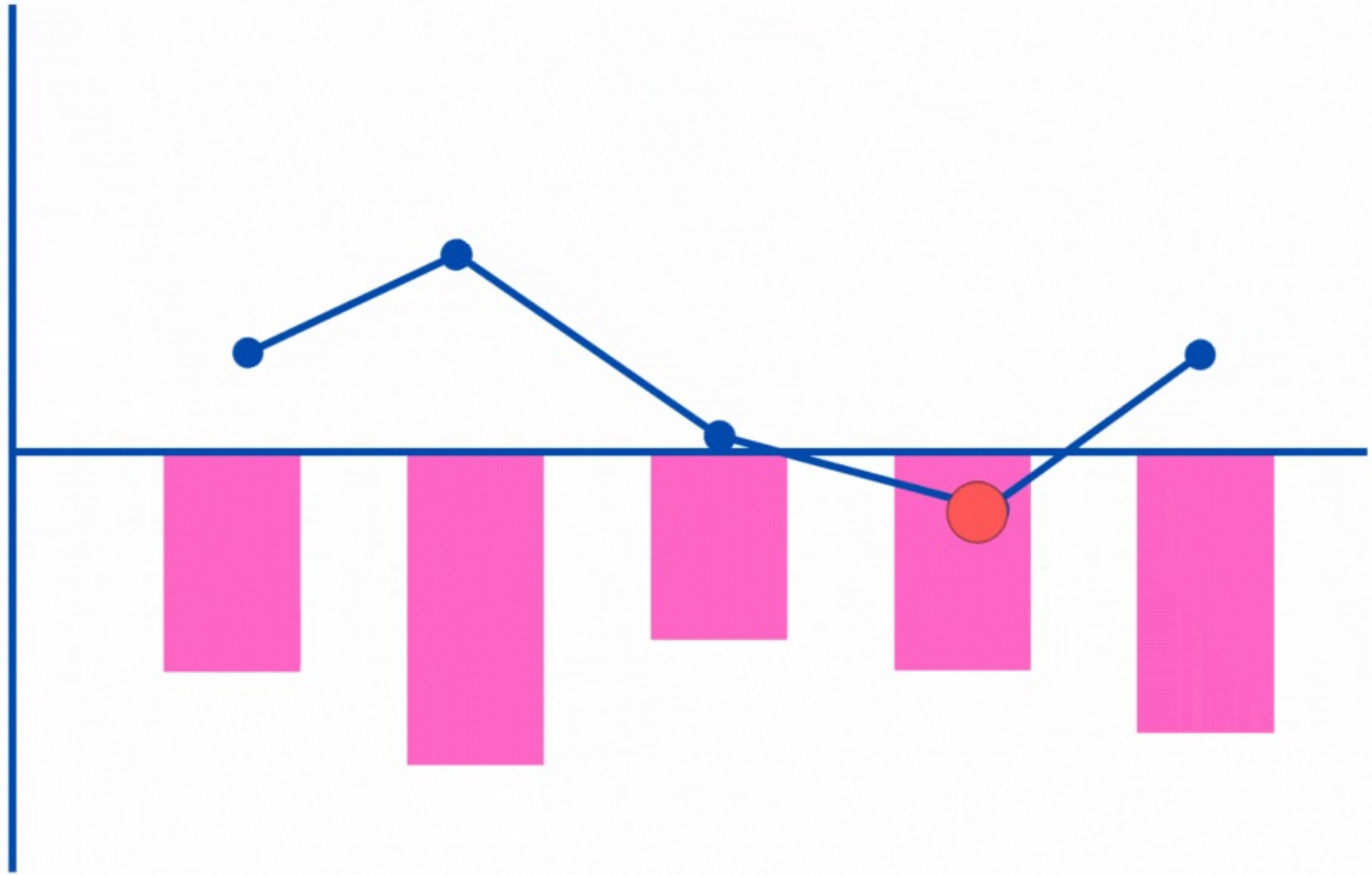
Today

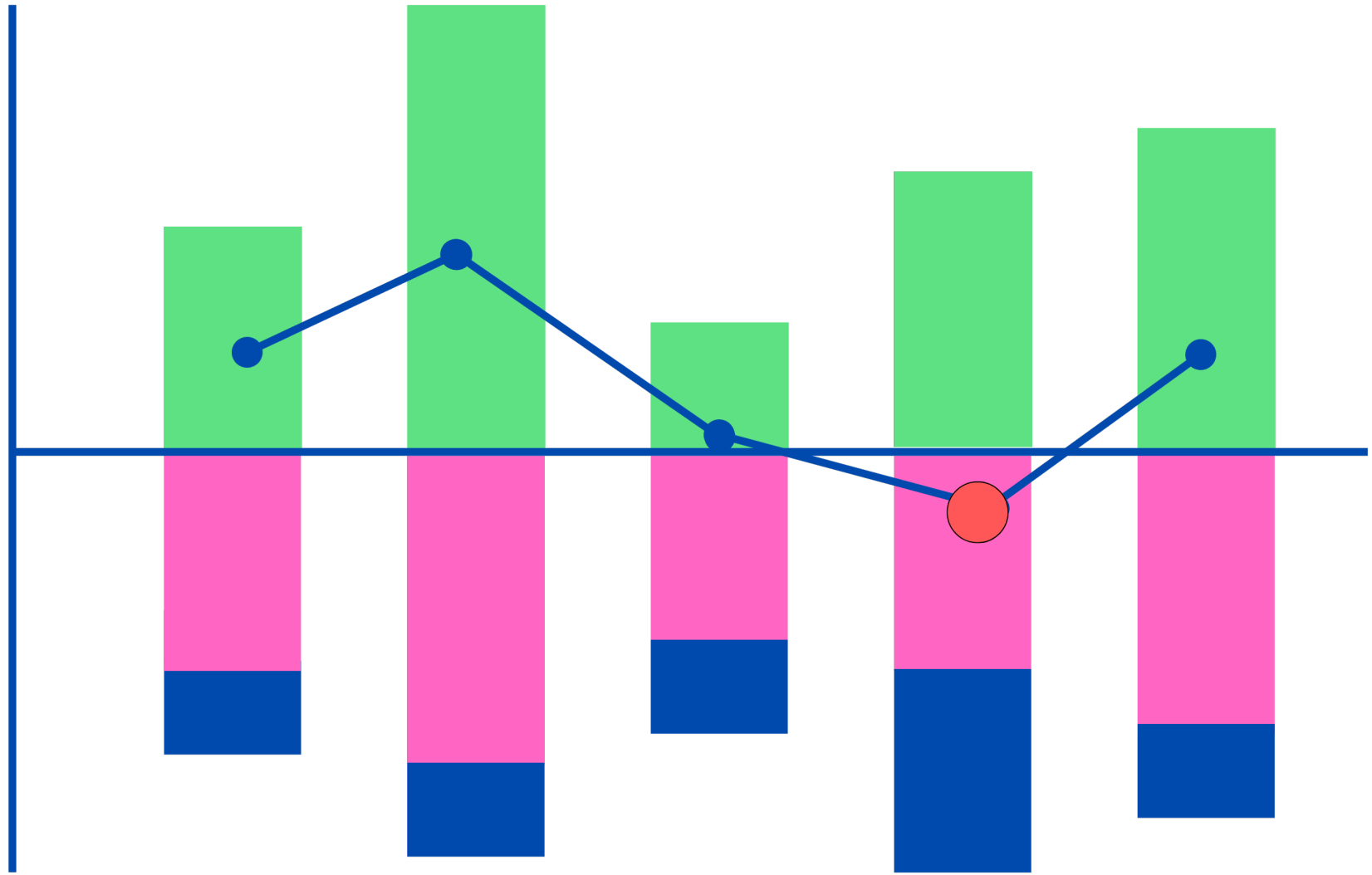


May	June	July	Aug	Sept
$140,000	$260,000	$20,200	-$52,300	$140,000









	May	June	July	Aug	Sept
$	$260,500 Starting Balance				
$ In	$230,000	$630,000	$50,600	$330,500	$550,500
Proj1					
Proj2					
Proj3					
$ Out	-$315,000	-$459,000	-$261,000	-$372,530	-$311,470
Fixed					
Prod					
People					
OH					
Jobs	-$35,500	-$51,000	-$29,400	-$30,470	-$46,730
Tax					
Goals					
Safety					
Expir.					
$ Bal	$14,000	$26,000	$2,200	-$5,230	$14,000

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ANNUAL MEETING
The International Conference for Small Firm Entrepreneur Architects
Austin, Texas · November 1-3, 2022
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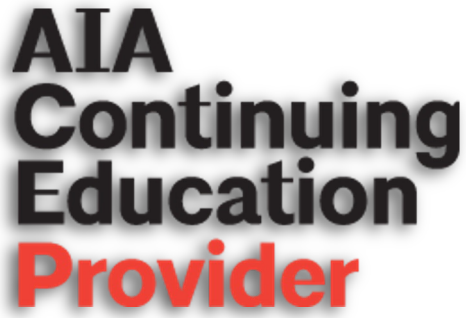

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How to sell without selling while Leading The Witness

If They’re Not Using You, They’re Doing It Wrong

9795.00
89.00 PER MONTH
900 PER MONTH
1995

Agenda

- Types of leads
- Simplifying your message
- Getting past the hardest part
- Being different than your competition
- Remembering the simple things
- Leading The Witness Questions

Types of Leads

Outbound

Types of Leads

Referrals

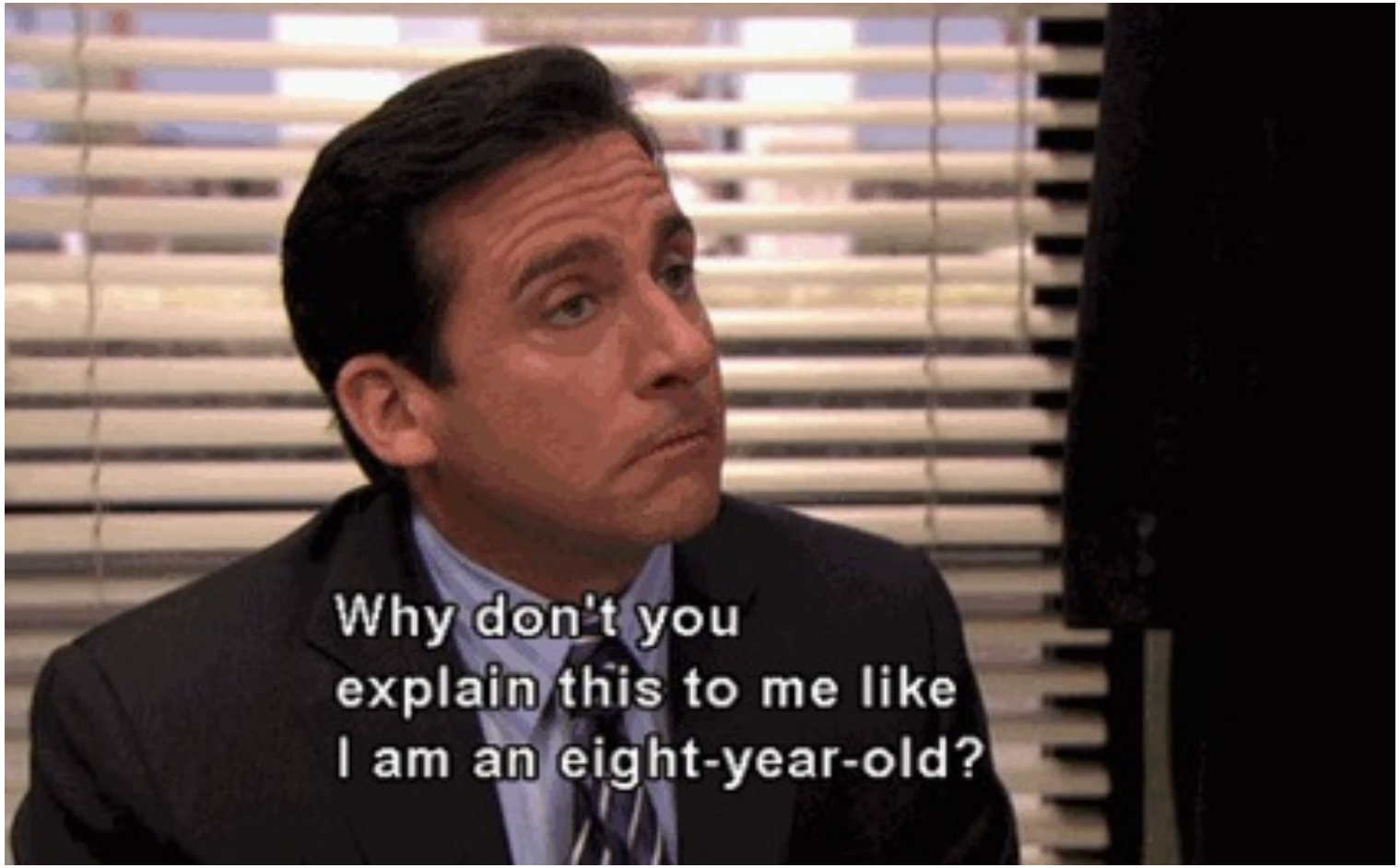
Types of Leads

Inbound

Be Creative

- Get your minds working

What does your company do?


Why don't you
explain this to me like
I am an eight-year-old?

Simplify the message

- We are an architect and design firm that assist our clients through their entire unique custom design process. Not only do we remove walls and work along side our clients personalized needs, but we ensure the process is simplified so that all of their fears disappear.

Springhouse

Breaking Through The Competiton

- Be relatable and build Rapport
- Do what you say
- Be First
- Stay in Control / Stay Confidant

If They’re Not Using You, They’re Doing It Wrong

What’s the hardest part of sales?

Double Tap

Deeper Questions Lead To Better Answers

LTW Questions – Open Ended

- How long does it take to get a plan back from your current architect?
- Describe for me how often you have to go back to your architect for plan revisions?
- How many revisions does your current architect allow you to have?
- How customizable does your architect allow you to be with the plans?
- Has the architect ever messed anything up?
- **What's your question?**

Fast 5 - Q and A

If They’re Not Using You, They’re Doing It Wrong

#KeepCharging

Cell: 210-279-8264

LinkedIn: Christopher Eckmann

Morning Break

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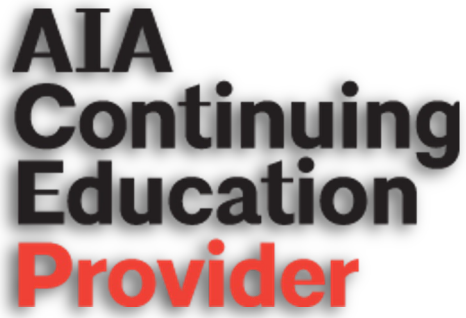

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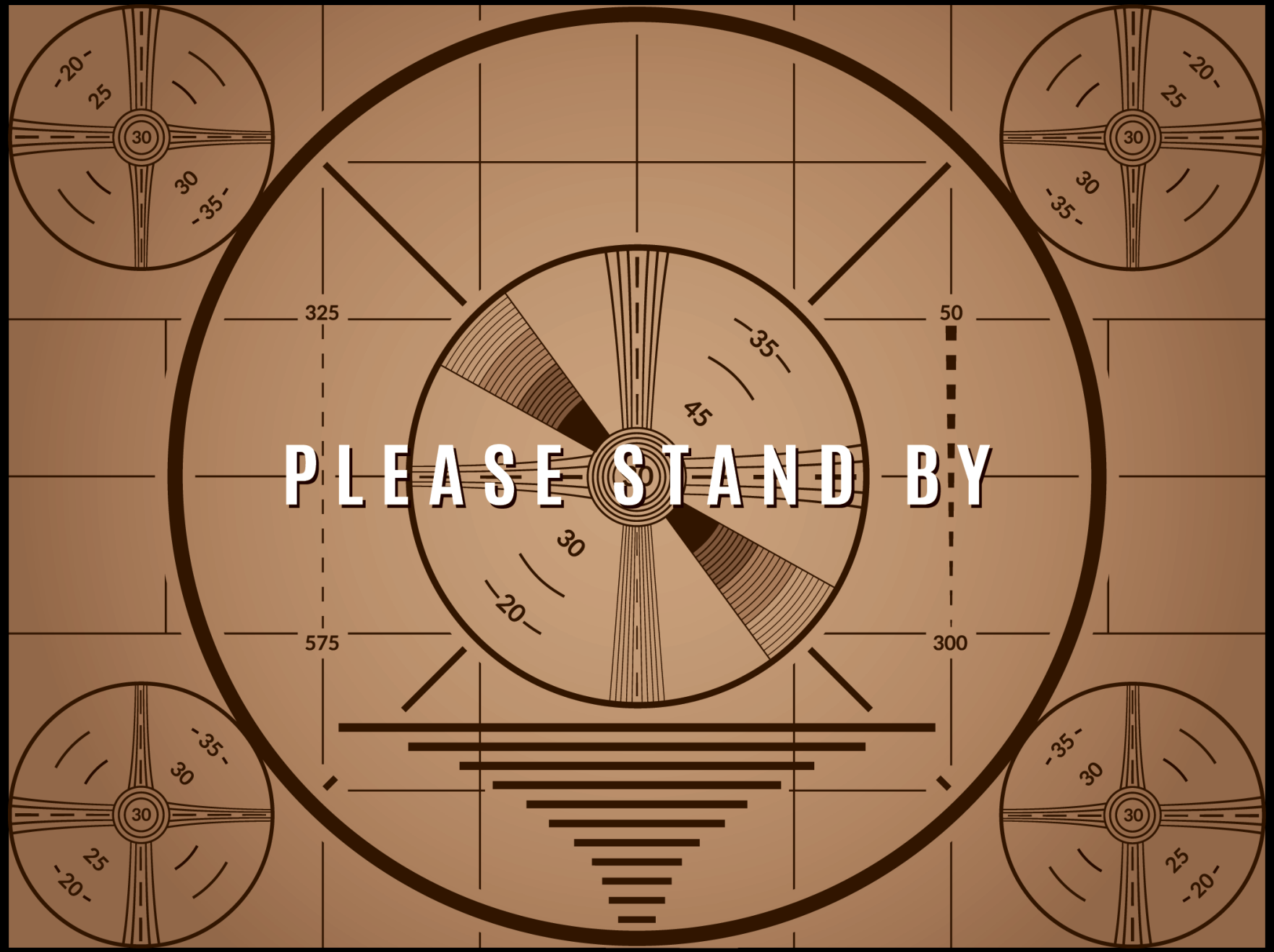

Strategic
Planning
Workshop

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CVG

CHARRETTE VENTURE GROUP

Thank you for Lunch.

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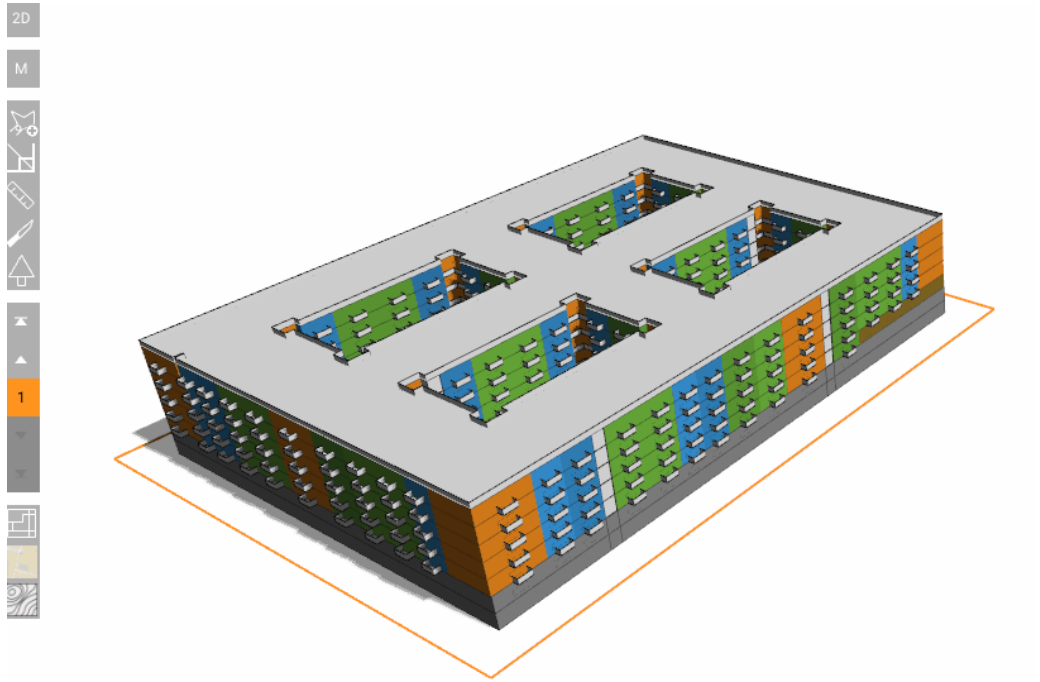
TestFit Inc.



tabulation	development	schemes	errors	energy	rendering	
Multifamily		Summary		Costs		Metrics	
Units	548	Revenue	$10,989,744	Land Costs	$3,542,160	Yield on Cost	5%
Average	760	Expenses	$5,494,872	Soft Costs	$23,512,650	Cap Rate	5%
Parking Ratio	1.50	NOI	$5,494,872	Hard Costs	$78,375,500	Value	$109,897,440
				Total Costs	$105,430,310		

Thank you for supporting Session 4.

Welcome to Session 4

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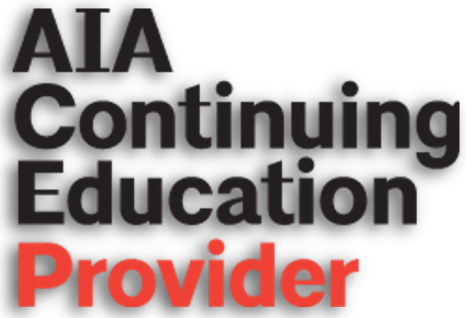

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Transforming the Practice of Architecture

Hello disruptors!

+

Evelyn M. Lee, MBA, FAIA

Head of Workplace Strategy & Innovation, Slack
Founder, Practice of Architecture
Co-Host, Practice Disrupted

Je'Nen M. Chastain, MBA, Assoc. AIA

Founder, Apostrophe Consulting
Co-Host, Practice Disrupted

PRACTICE DISRUPTED

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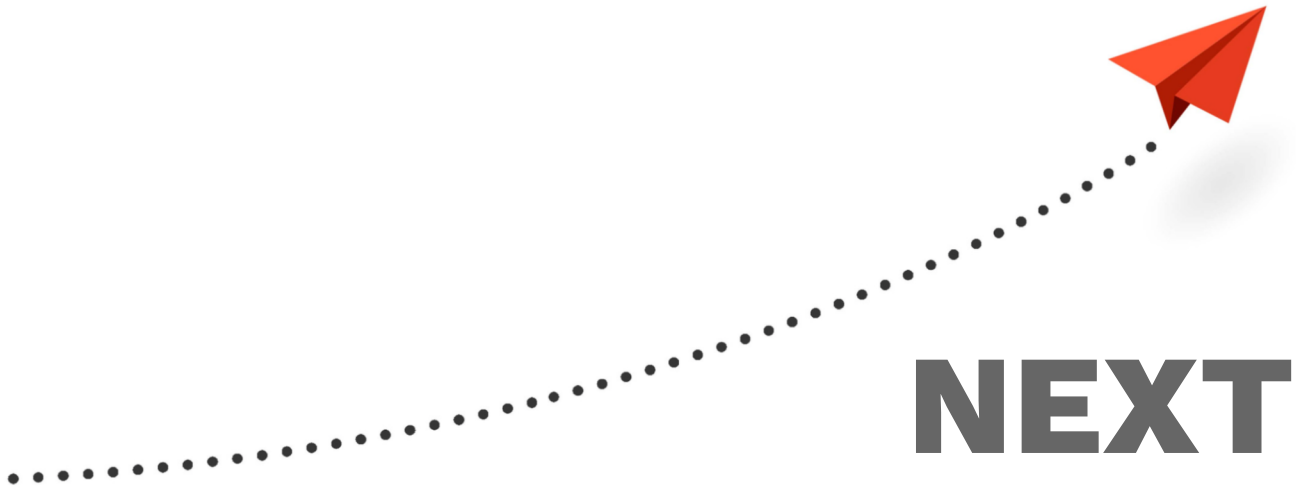
4 Trends in Practice:

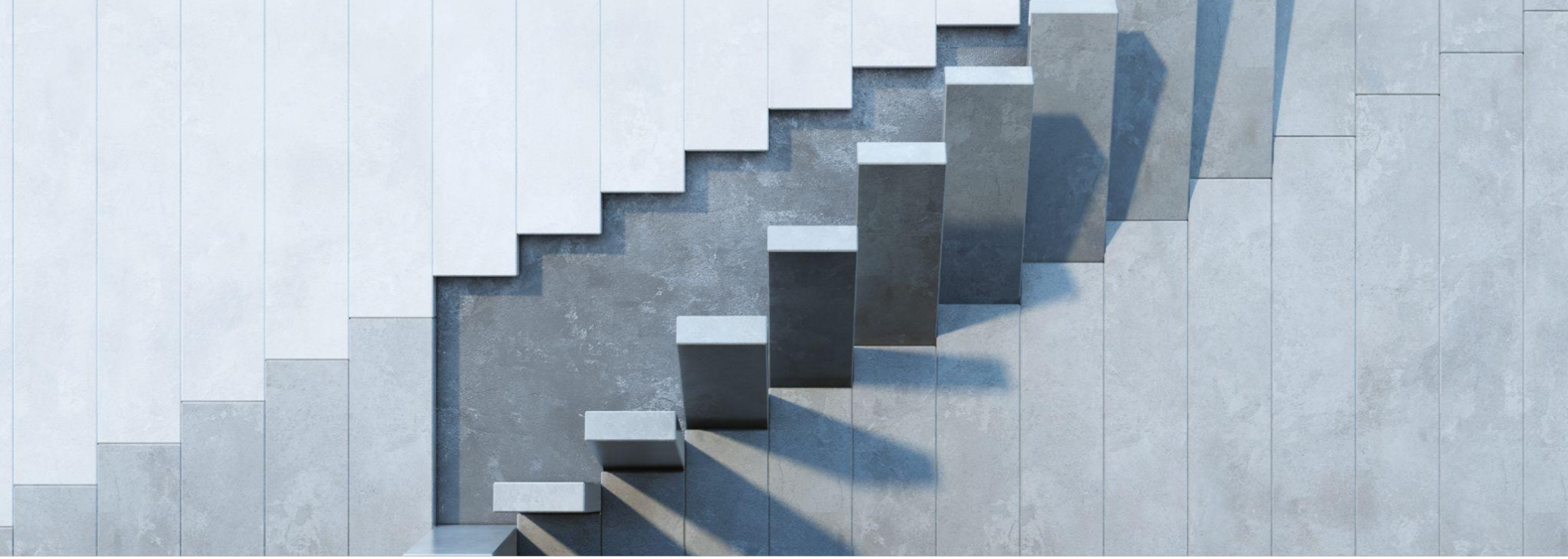


CULTURE

NEXT GEN LEADERS

BUILDING GREAT TEAMS

WORKPLACE TRENDS & TOOLS



CULTURE

CULTURE

long nights
overworked
under valued
lack of trust
poor communication
disengaged employees
unhealthy competition
scope creep

what studio
CULTURE IS

long nights
overworked
under valued
lack of trust
poor communication
disengaged employees
unhealthy competition
scope creep

what studio **CULTURE IS**

long nights
overworked
under valued
lack of trust
poor communication
disengaged employees
unhealthy competition
scope creep

SHOULD BE

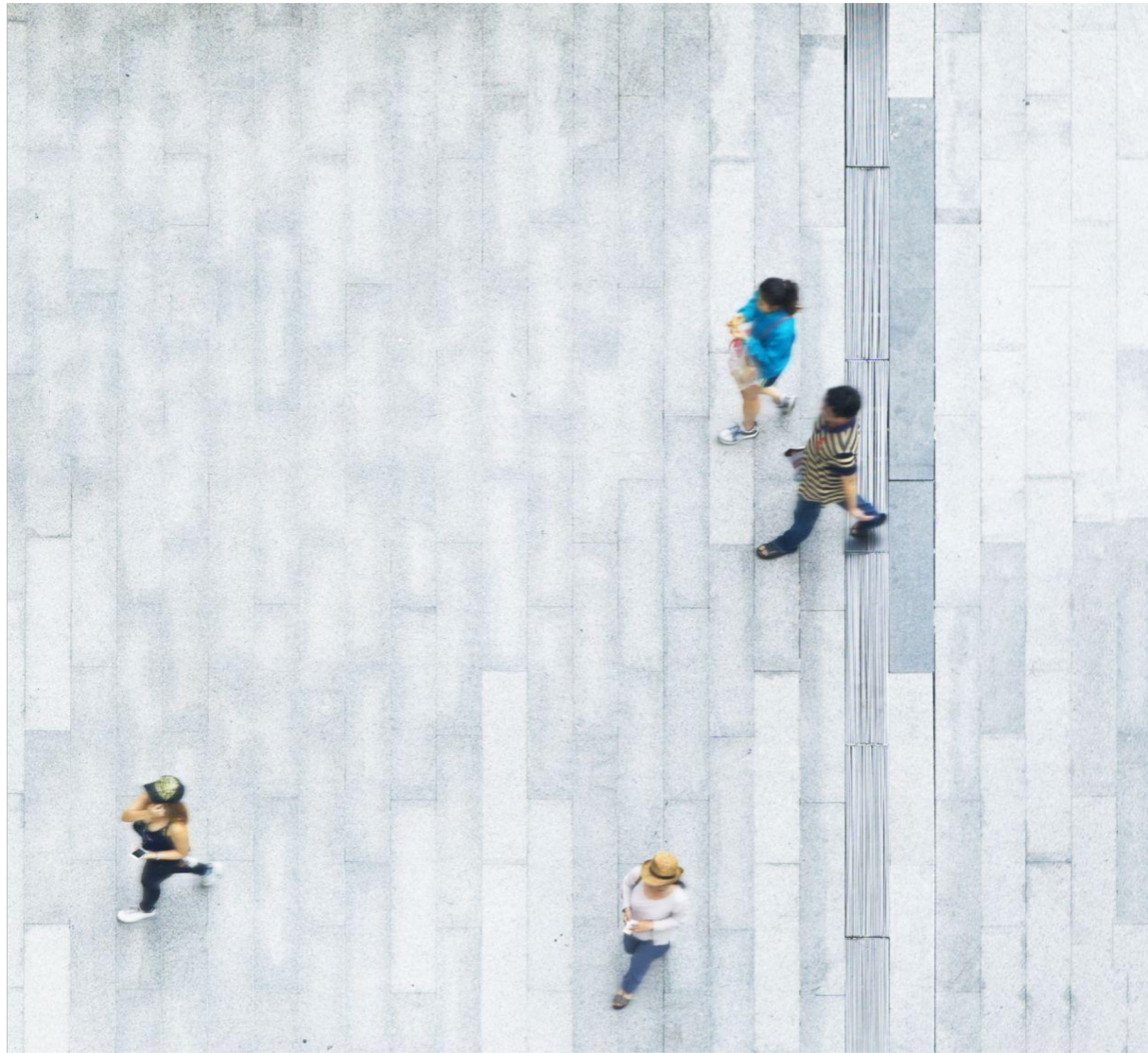
values based
built on trust
open & transparent
drives agility
celebrates wins
empowered employees
low turnover
healthy boundaries

CULTURE IS...

... a set of attitudes, principles, beliefs, objectives, and other traits a business follows to create a satisfying work environment & client engagement.

6 steps to building a better culture

1. define your values
2. be authentic
3. create listening posts
4. build psychological safety
5. accept and learn from mistakes
6. watch trends



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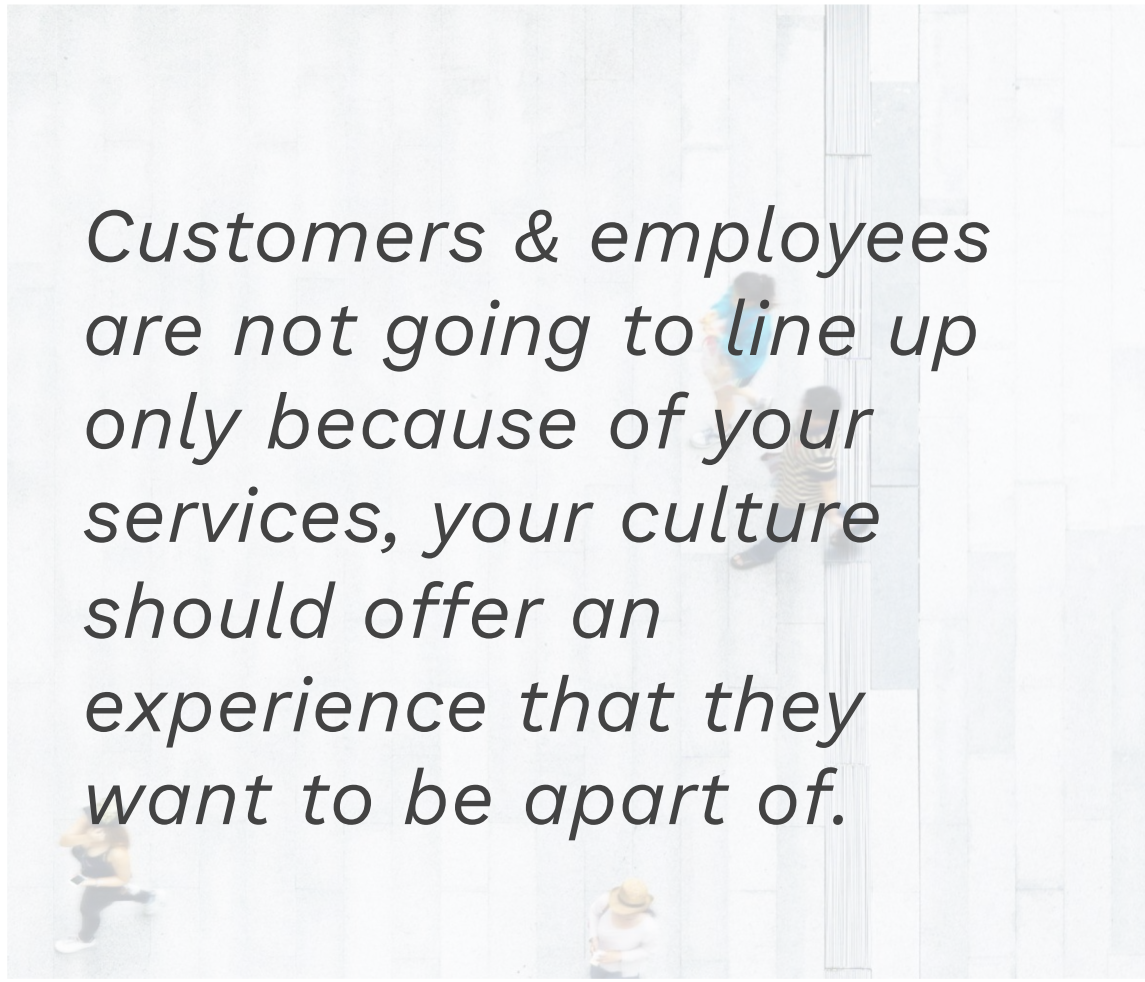

Customers & employees are not going to line up only because of your services, your culture should offer an experience that they want to be apart of.

6 steps to building a better culture

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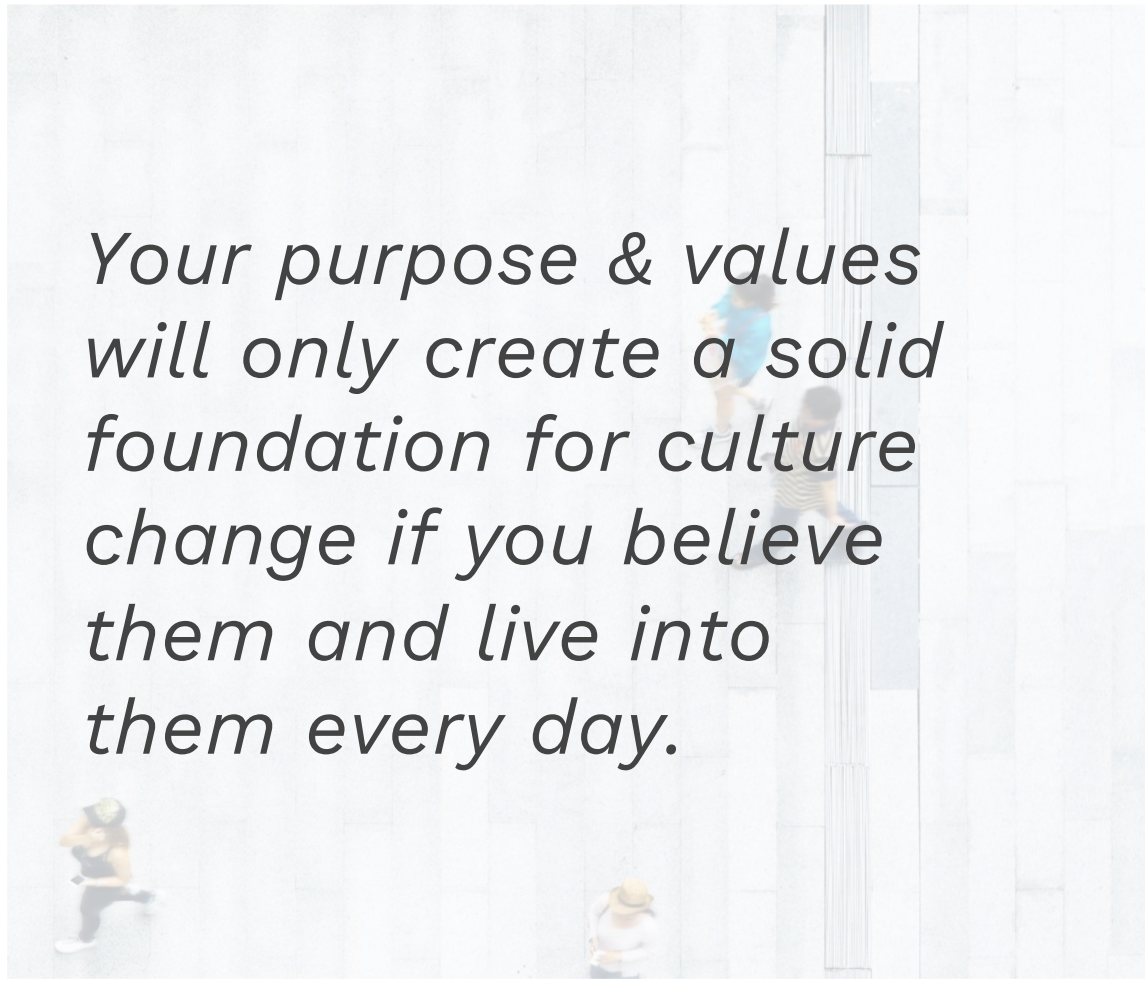

Your purpose & values will only create a solid foundation for culture change if you believe them and live into them every day.

6 steps to building a better culture

1. define your values
2. be authentic
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5. accept and learn from mistakes
6. watch trends

Surveys measuring engagement & trusts can be powerful tools for collecting honest feedback from your teams and clients.

6 steps to building a better culture

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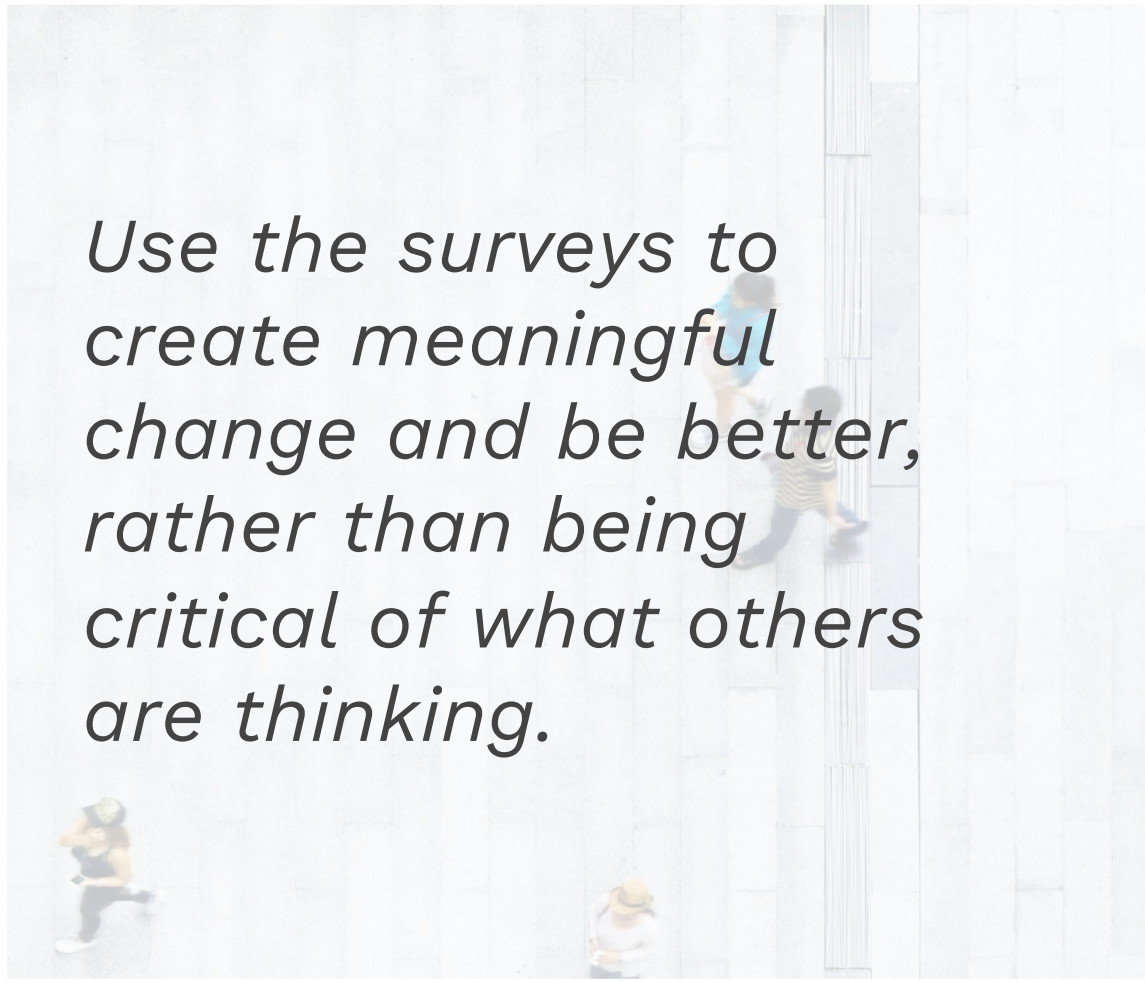

6 steps to building a better culture

1. define your values
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Openly acknowledge that mistakes will happen. Use each on as an opportunity for growth.

6 steps to building a better culture

1. define your values
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3. create listening posts
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5. accept and learn from mistakes
6. watch trends

Change is the only constant, so the process of creating culture change will be iterative.

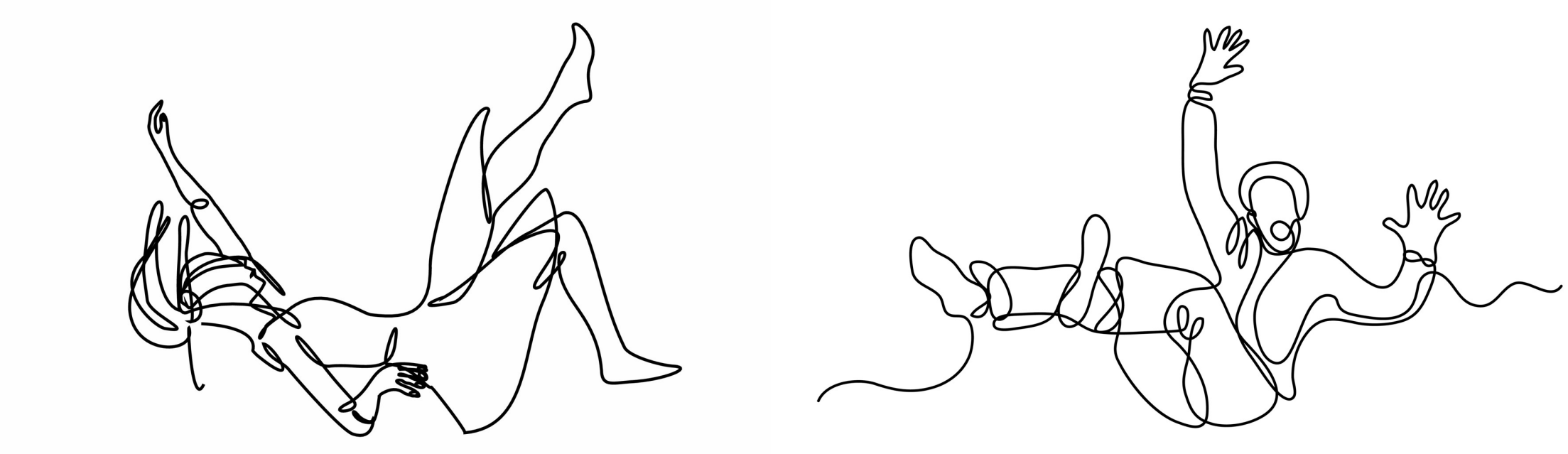
QUESTION

What is something one thing you can do next week to change the culture of your studio for the better?

NEXT GEN LEADERS

People are the **most important part** of any design studio.

Talent development is ***NOT*…**



“throwing people in the deep end.”

ACTUAL talent development looks like…

helping others rise to their potential.

Lack of mentorship negatively impacts: projects, people, & profit $$$

Scenario #1:
Lack of 1-to-1 feedback on performance

> What's happening: Staff report a lack of meaningful dialogue related to workplace performance inside of architecture firms

> Observed behaviors: Individuals under-communicate due to downward pressure from projects –*and/or*– confuse criticism as feedback

> Need: Move teams beyond 'crit culture' communication and teach staff to give effective feedback in support of retention & talent development

Scenario #2:
Failure to delegate tasks to others

> What's happening: Managers are not sure how to delegate and/or give up control of project work

> Observed behaviors: Do it yourself mentality – *and/or*– micromanagement

> Need: Mentorship on basic project management foundations, team communication, and mentorship skills

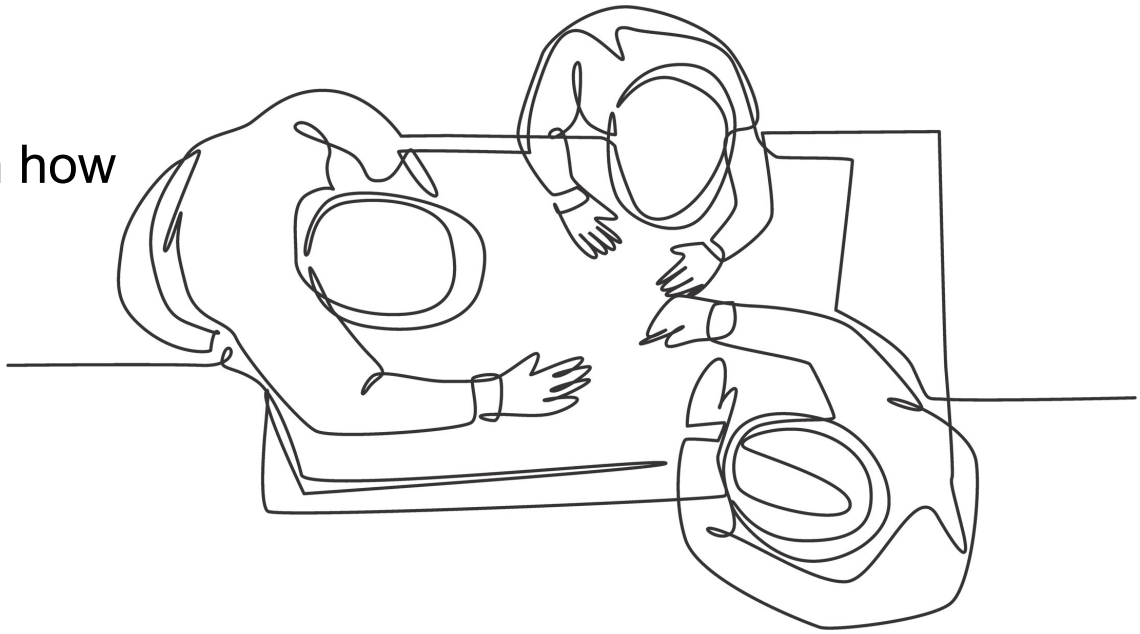
Scenario #3:
Learning to face difficult conversations

with… **bosses, co-workers, GC, owners, consultants, etc.**

> What's happening: Individuals lack confidence in how to navigate difficult conversations

> Observed behaviors: Uncertainty and mismanagement negatively impact the team/project

> Need: Mentor on how to navigate difficult conversations and confrontation



Scenario #4:
Managing when it goes wrong

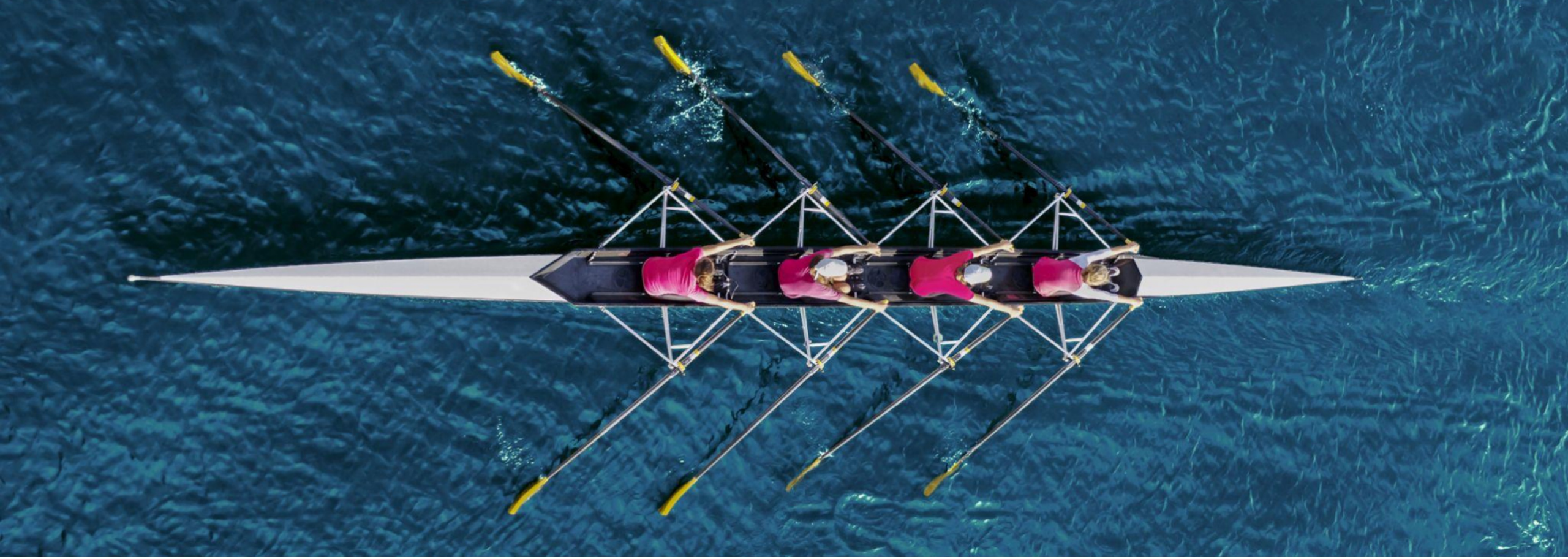
> What's happening: Overwhelm keeps teams in reactionary positions, leading to mental burnout and exhaustion

> Observed behaviors: Endlessly putting out fires… reactionary decision making… and fear of mistakes

> Need: Understand that these patterns are symptoms of things that can be changed. Build a culture where people work together to move away from these patterns.

QUESTION

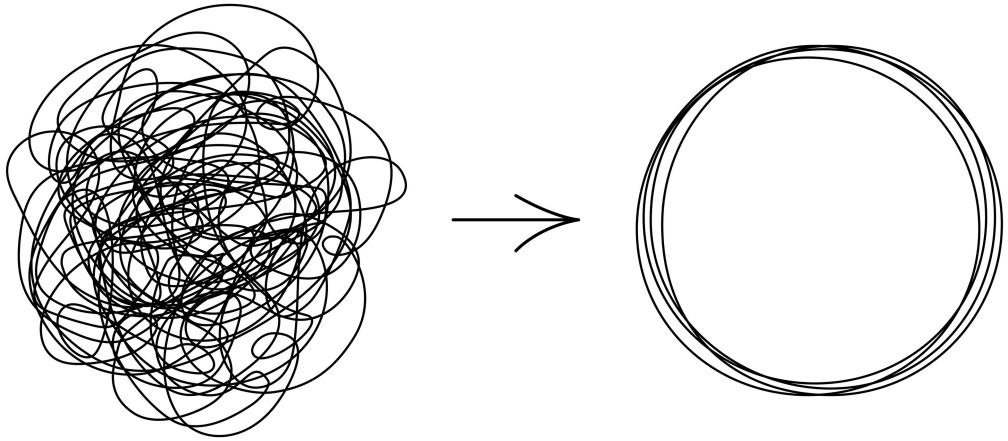
Do any of the above scenarios sound familiar in your studio? Which one(s)?



BUILDING GREAT TEAMS

What's at risk if we neglect our talent?

- **Projects:** Underperformance in the quality of project delivery
- **People:** A dip in staff retention due to lack of engagement and/or burnout
- **Profit:** Eroding profit margins $$$
- **Industry:** Sinking our own ship… loss of value, talent, and impact



What steps can you take forward?

BRIDGE
THE GAP

Think of Mentorship as the Metric for a Healthy Studio Culture

- **Create a structure** for how, where, when, and why mentorship fits into your firm
- **Encourage and support staff** to participate in programs like the AIA Charlotte Mentorship Program
- **Allocate $$$ in your budget towards** talent development and invest in meaningful OH expenses that support your people
- **Question outdated management norms** in your practice
- **Design a culture of mentorship**

A Few Case Study Projects

Mentorship & Communication @ brick., Oakland, CA

Mentorship @ KieranTimberlake, Philadelphia, PA

Leadership @ LS3P Raleigh , Raleigh, NC

Change Management @ Neighboring Concepts, Charlotte, NC

Change Management @ Perkins&Will, Houston, TX

Communication @ WRNS, NYC, San Francisco, & HI

playing to our strengths:

mentorship matrix
quick reference for
informal mentoring

matrix key

mentee

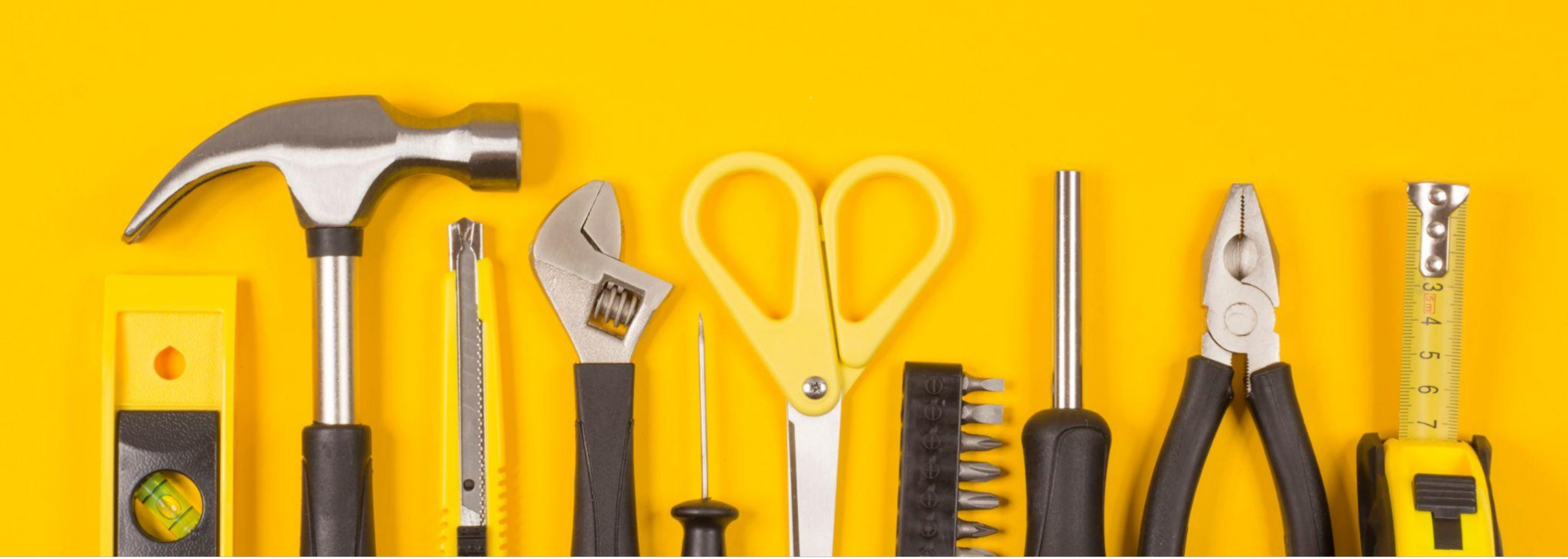
mentor

both

	architecture licensing (AXP & AREs)	firm management & business	project management	architectural design	technical proficiency	technology & digital tools	marketing & business development	client management	codes & agency approval	team communication	rendering & graphics	leadership development	equity, diversity, & social justice	sustainable design	interested in sharing tips on:
anakin	both	both	both	both	mentee	mentee	mentee	mentee	mentee	mentee	N/A	both	mentee	mentee	the dark side
luke	N/A	mentee	N/A	N/A	N/A	mentee	mentee	mentee	N/A	both	N/A	both	mentee	mentee	the force
leia	both	mentee	mentee	mentee	N/A	mentee	mentee	both	mentee	mentee	mentee	both	mentee	mentee	leadership
hans	mentee	mentee	mentee	both	mentee	both	mentee	mentee	mentee	mentee	both	both	mentee	mentee	the millennium falcon
chewbacca	N/A	mentee	mentee	mentee	N/A	mentee	mentee	both	N/A	mentee	mentee	mentee	N/A	N/A	N/A
rey	N/A	mentee	both	mentee	mentee	mentee	N/A	mentee	mentee	mentee	mentee	mentee	mentee	mentee	N/A
ashoka	both	mentee	mentee	mentee	mentee	mentee	mentee	mentee	both	both	mentee	both	mentee	mentee	N/A
yoda	both	mentee	both	both	both	mentee	mentee	both	mentee	mentee	N/A	both	mentee	mentee	the force
grogu	mentee	N/A	mentee	mentee	mentee	mentee	N/A	N/A	mentee	mentee	mentee	mentee	mentee	mentee	snacks
eno	mentee	mentee	mentee	mentee	mentee	mentee	mentee	mentee	mentee	mentee	mentee	mentee	mentee	mentee	N/A
mando	both	mentee	mentee	both	mentee	both	mentee	both	mentee	mentee	both	both	N/A	N/A	N/A

QUESTION

How can you support more people in your studio through talent development?



WORKPLACE TRENDS & TOOLS

build a digital HQ where everyone can come and work together no matter where they are

How we build connection has shifted. Community is now digital as well as physical.

People who work at companies they describe as **technology innovators see higher employee experience scores on all dimensions:**

1.5X scores on **productivity**

2X scores on **sense of belonging**

2.5X scores on **overall satisfaction**

Source: Future Forum Pulse, Wave 6, conducted Jan. 27-Feb. 21, 2022. Number of completed responses = 10,818.

Technology innovators are dramatically outpacing laggards on productivity.

People who work at companies they describe as technology innovators see

+59%
higher scores on ability to focus

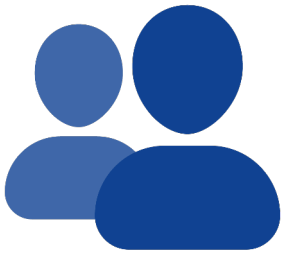
+57%
higher scores on access to resources

+50%
higher scores on productivity

Source: Future Forum Pulse, Wave 7, conducted May 2–16, 2022. Number of completed responses = 10,646.

create asynchronous workflows that offers flexibility within limits

The data is clear. Employees want flexibility.



55% of employees are open to looking for a new job in the next year;

70% **if dissatisfied with current flexibility.**

Flexibility ranks

2nd

Only to compensation in terms of job satisfaction

Source: Future Forum Pulse, Wave 6, conducted Jan. 27-Feb. 21, 2022. Number of completed responses = 10,818.

Flexibility means more than just a day or two working from home

80%

want flexibility in **where** they work

94%

want flexibility in **when** they work.

Flexibility boosts productivity: those with location flexibility report **9%** higher productivity scores, schedule flexibility report **36%** higher scores

Source: Future Forum Pulse, Wave 6, conducted Jan. 27-Feb. 21, 2022. Number of completed responses = 10,818.

clients & employees

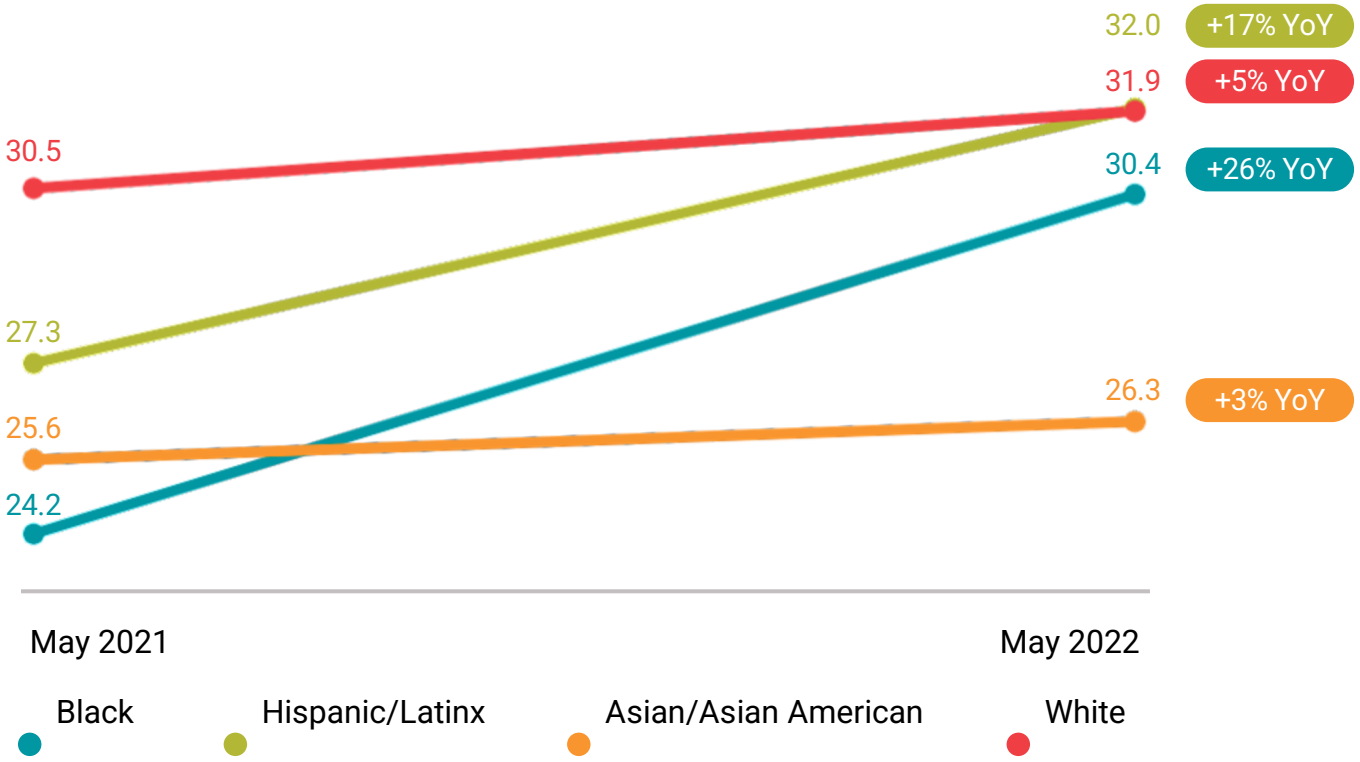
manage expectations through a client onboarding process and document - similar to an employee handbook have them acknowledge that they have read the document and agree to the terms within

create core working hours where the team is available for one another, 2-3 hours a day

removing barriers increases a sense of belonging

Employee experience scores have risen since the broad adoption of flexible work, especially for Black and Latinx employees.

"Sense of belonging at work" scores



Source: Future Forum Pulse, Wave 7, conducted May 2–16, 2022. Number of completed responses (US) = 5,448.

Percentage increase between May 2021 and May 2022

+26%
increase for Black respondents

+17%
increase for Hispanic/Latinx respondents

+5%
increase for white respondents

brainstorming vs brainwriting

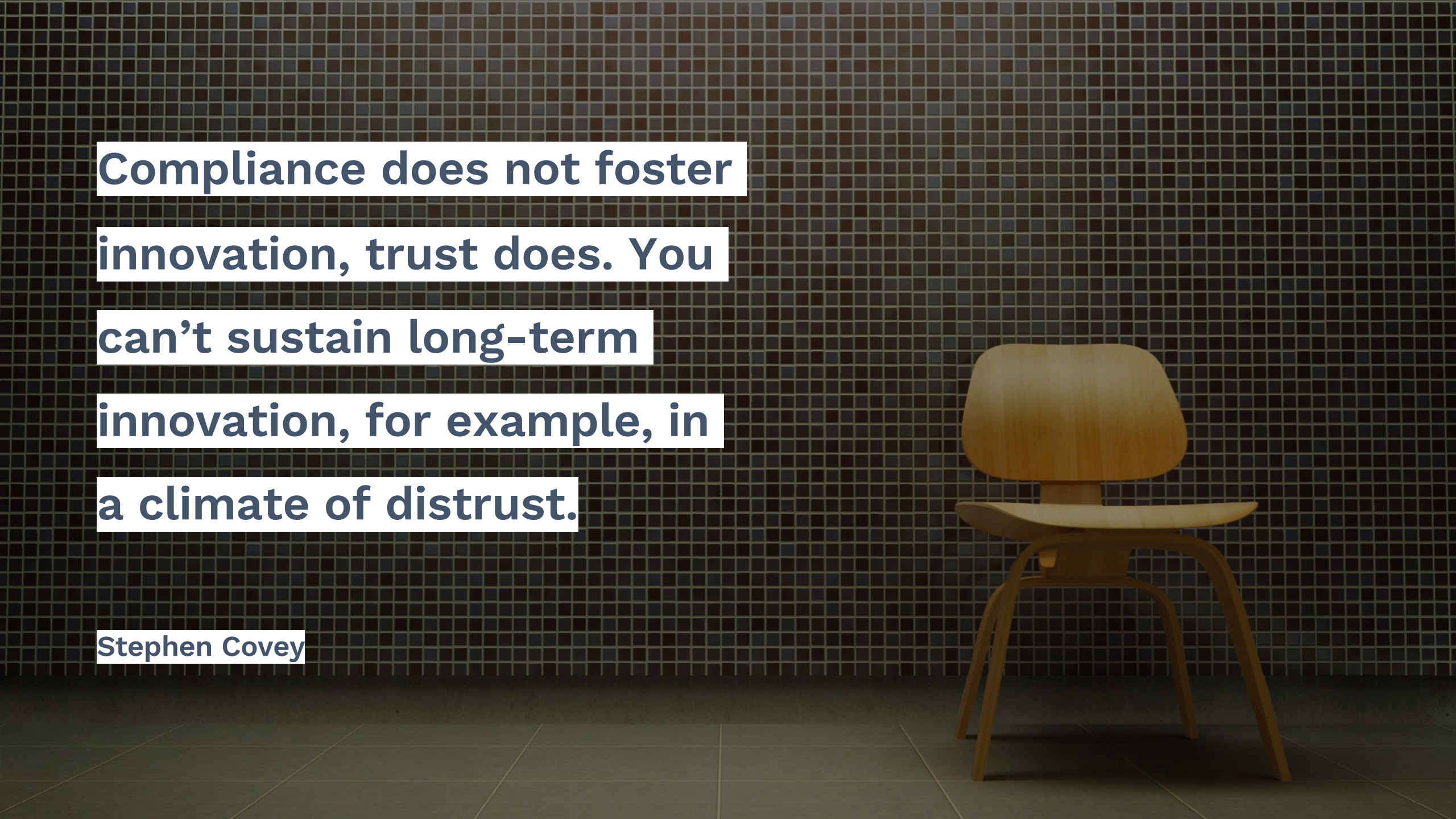
often segregates more introverted individuals, leads to groupthink, and is weighted heavily to whomever is leading the conversation

ensures that everyone has the ability to process the problem and post their ideas, so everything is on the table for discussion

open innovation by creating a culture of trust

Compliance does not foster innovation, trust does. You can’t sustain long-term innovation, for example, in a climate of distrust.

Stephen Covey



QUESTION

Where else are you struggling in business operations in your practice?

THANK YOU

Evelyn M Lee, MBA, FAIA

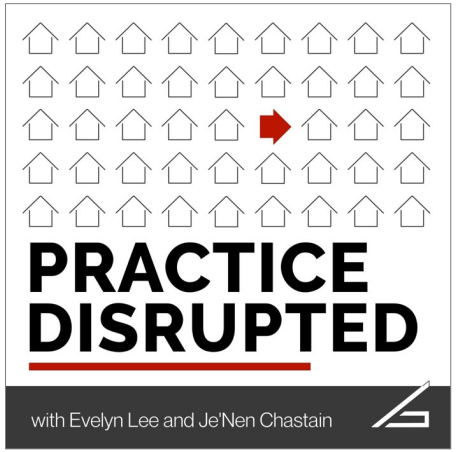
Practice of Architecture
evelyn@practiceofarchitecture.com
@evelynmlee

Je’Nen Chastain, MBA, Assoc. AIA

Apostrophe Consulting
jenen@apostrophe.consulting
@apostrophe_design

Questions?

Reach out to us directly; or find us on the podcast!



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The International Conference for Small Firm Entrepreneur Architects
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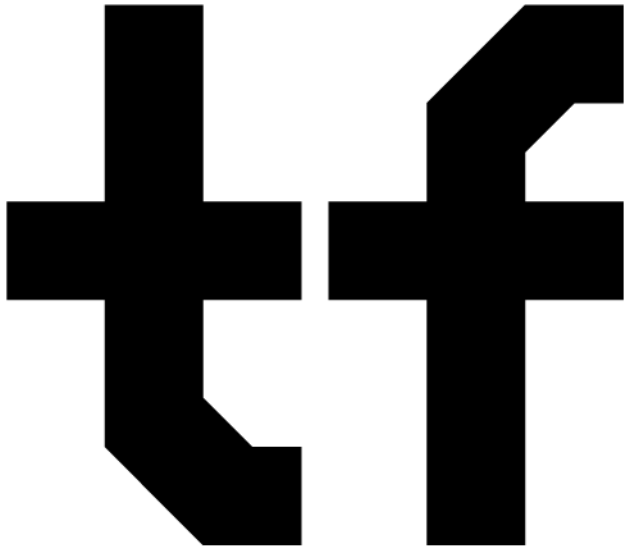

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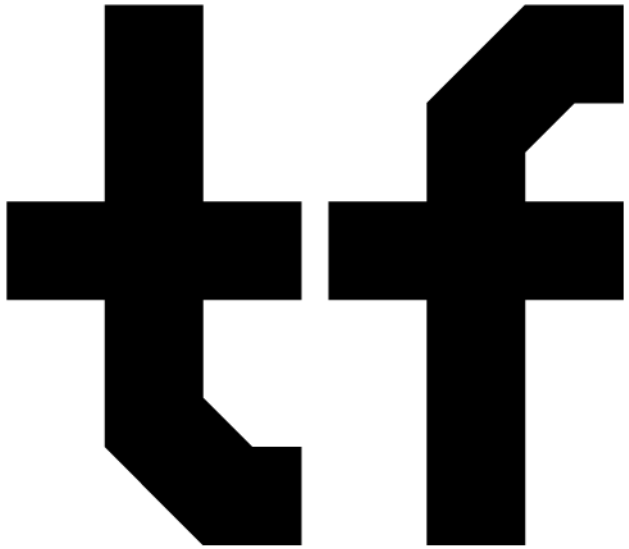
Evan Troxel



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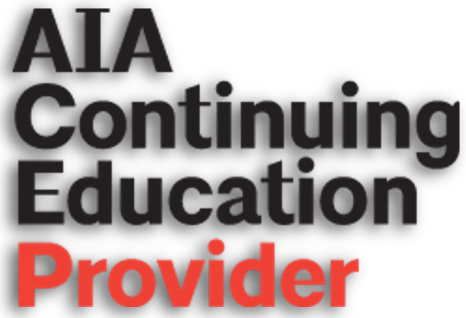

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THE ROLE OF ROUTINE

ENCOURAGE/BUILD/GROW

speedo

What would your life be like if you got just 1% Better Every Day?

READY FOR TAKEOFF?

ARIANNA HUFFINGTON

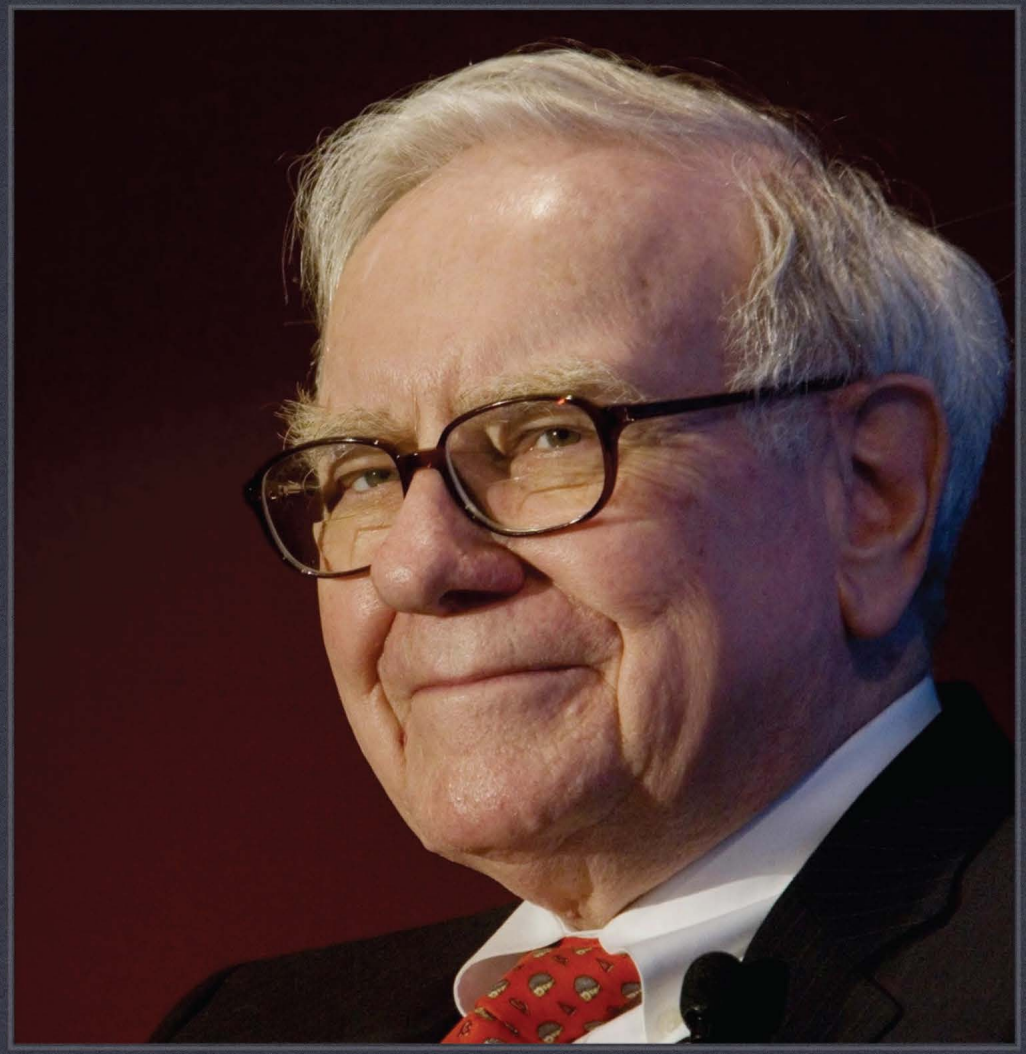
LOVES BUTTER WITH HER COFFEE AKA BULLETPROOF STYLE

CHERYL SANDBERG

GOES HOME EVERY NIGHT AT 5:30 PM

WARREN BUFFETT

AVOIDS SCHEDULING MEETINGS OR APPOINTMENTS IN ADVANCE



SIR RICHARD BRANSON

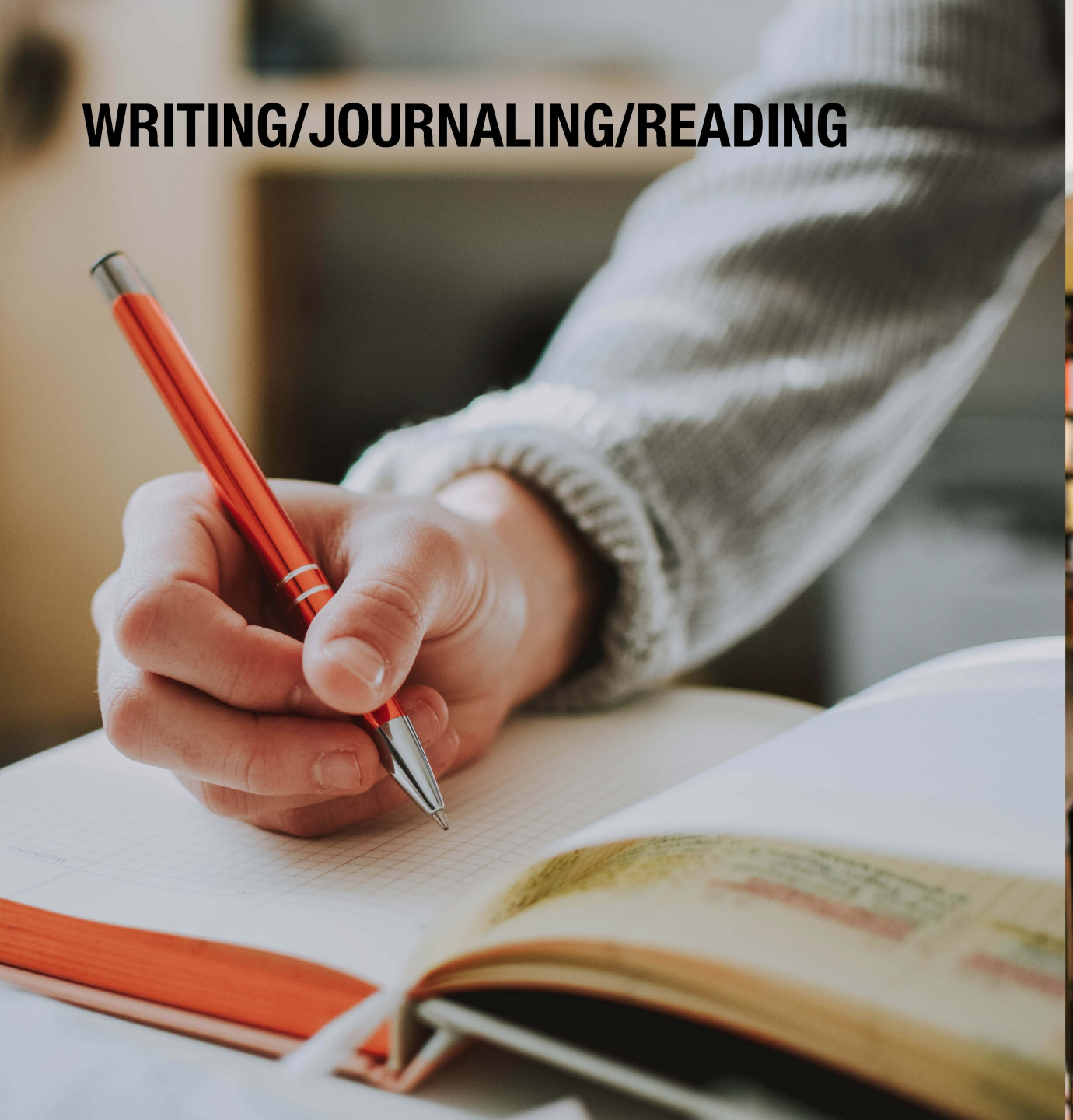
MORNING EXERCISE AND BREAKFAST WITH FAMILY EVERY DAY

HOW DO WE EMPLOY ROUTINES THAT HELP US LIVE LIFE TO THE FULLEST & DO OUR JOB BETTER?

DEEP WORK/HEALTHY EATING/EXERCISE

MORNING AND EVENING ROUTINE/SLEEP/MEDITATION/PRAYER

WRITING/JOURNALING/READING



ARE YOU READY FOR A CHALLENGE?

Seinfeld

What would your life be like if you got just 1% Better Every Day for the next 90 Days?

YOU NEED TO DO THESE THREE THINGS

REMEMBER, DON'T BREAK THE CHAIN!

“You will never change your life until you change something you do daily.”

-Mike Murdock

Q&A

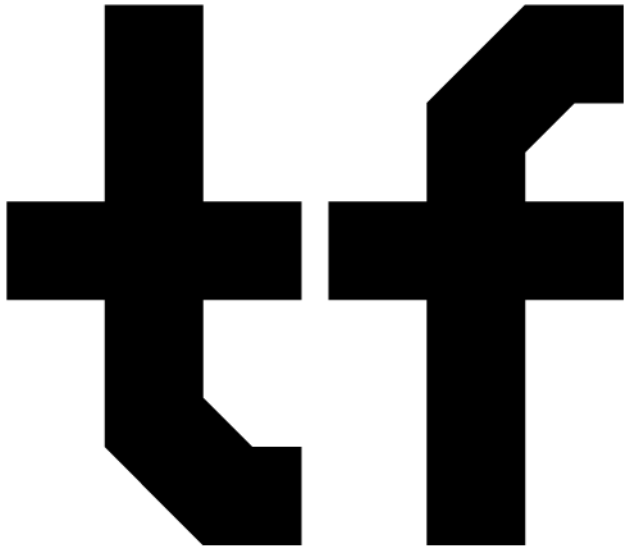
ENCOURAGE/BUILD/GROW

THANK
YOU

RANDY WILBURN

LINKEDIN.COM/IN/RANDYWILBURN @RANDYWILBURN ON TWITTER & INSTAGRAM
RANDY@ENCOURAGEBUILDGROW.COM
617-828-9093

Afternoon Break



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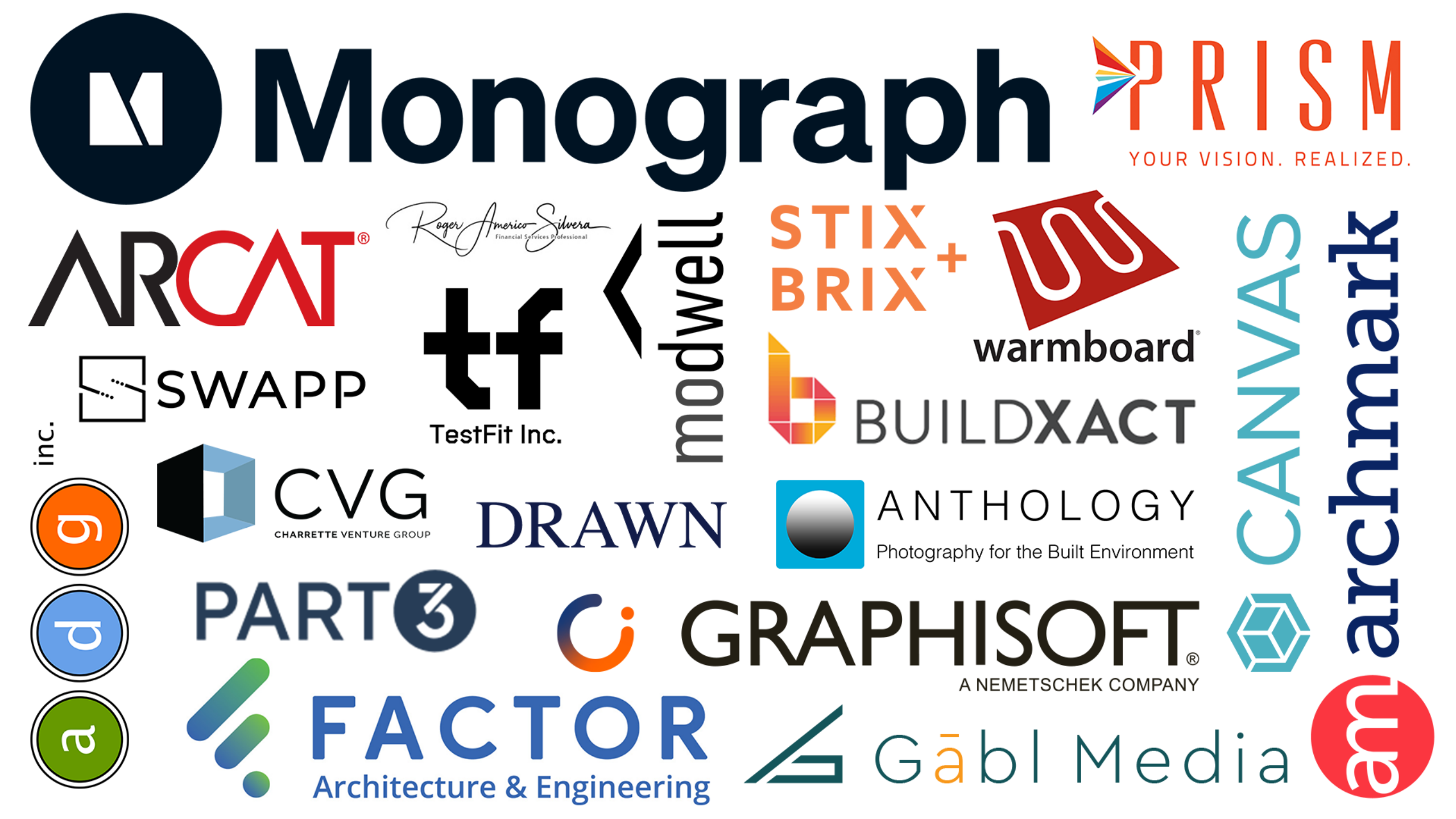
Closing Remarks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The 12-12-22 Project

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Ryan Frederick

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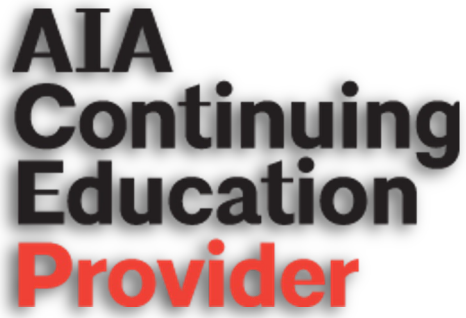

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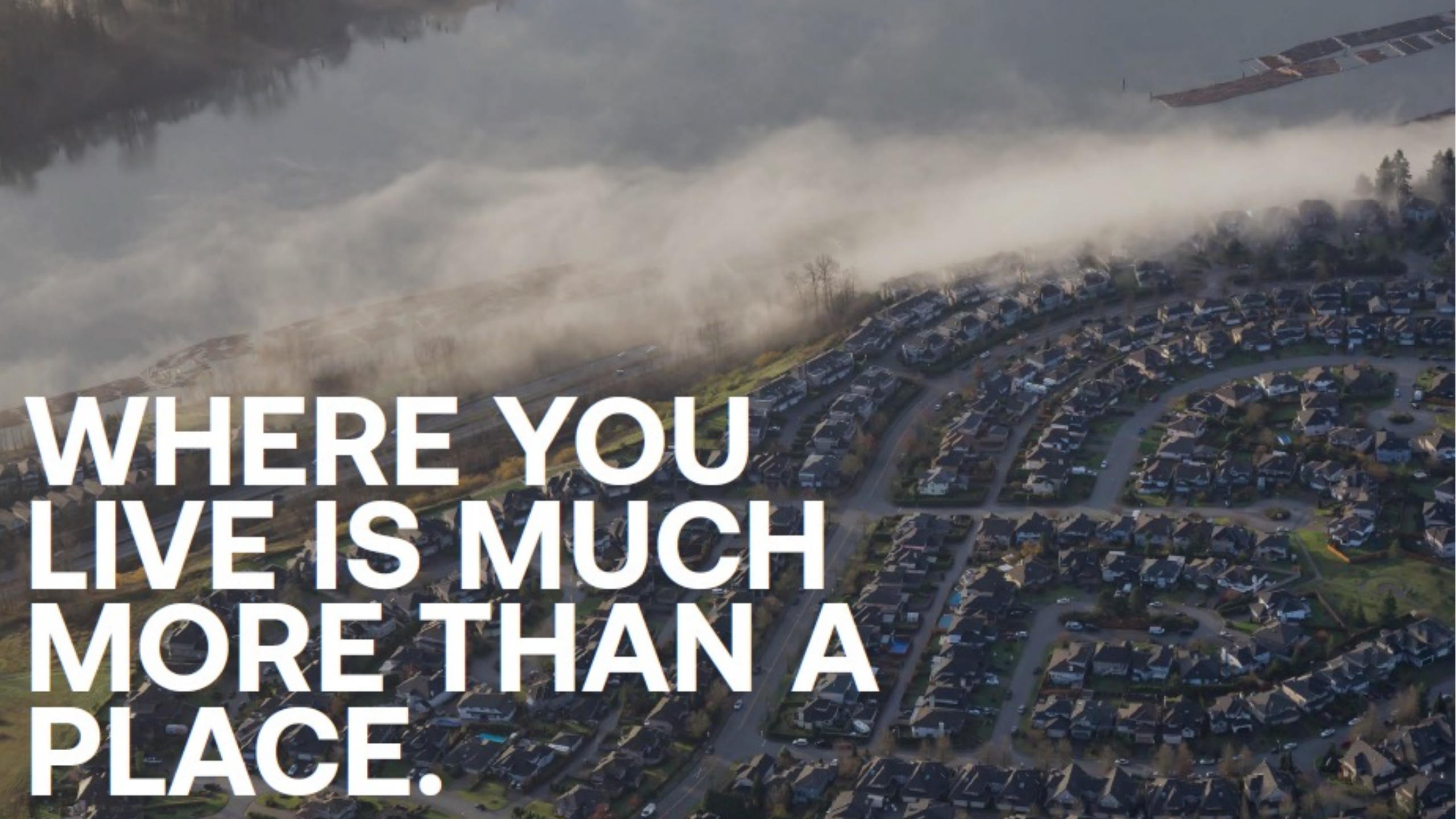
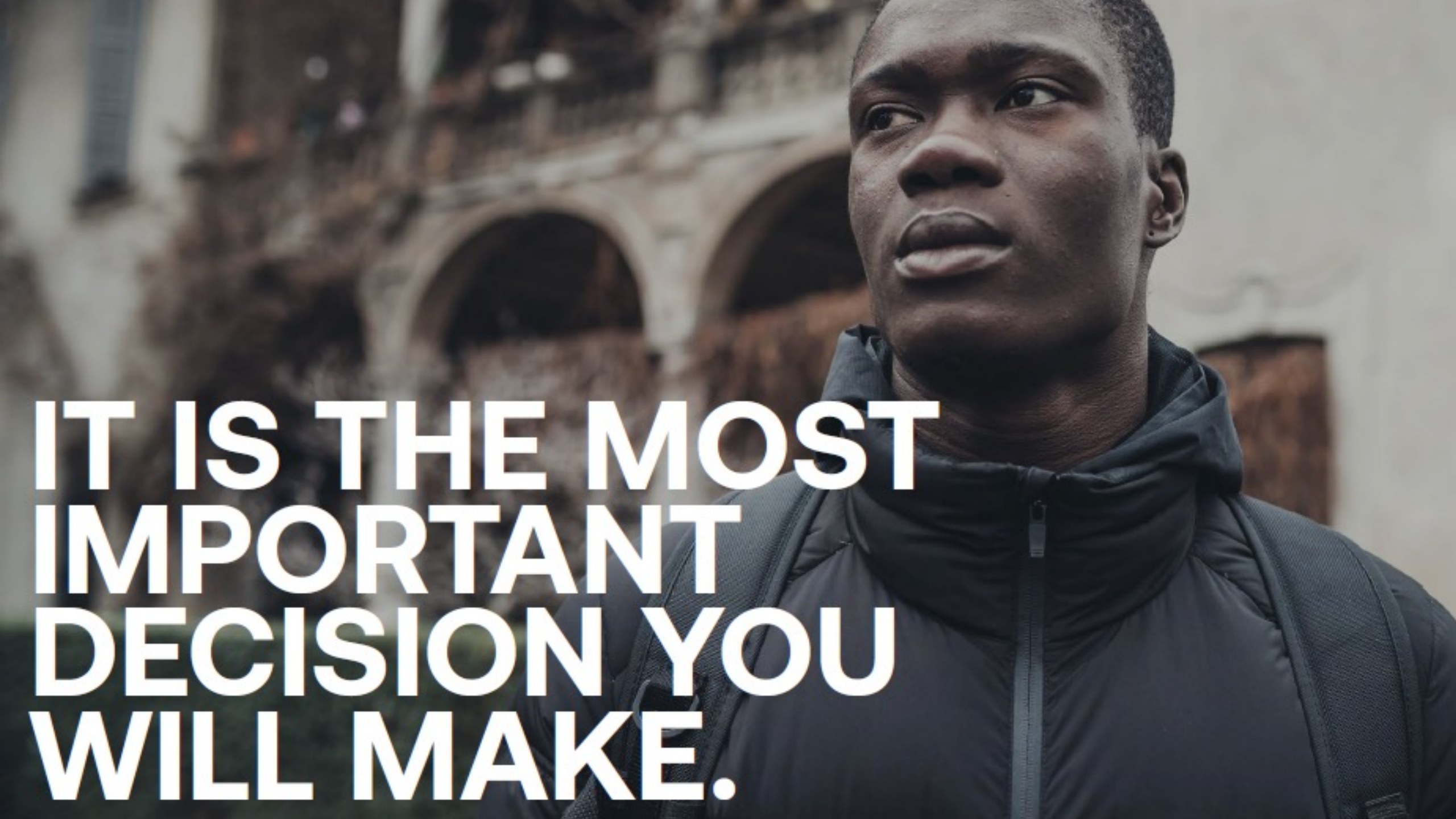
POWER OF PLACE: HOW WHERE WE LIVE IS FOUNDATIONAL FOR HEALTHY LONGEVITY

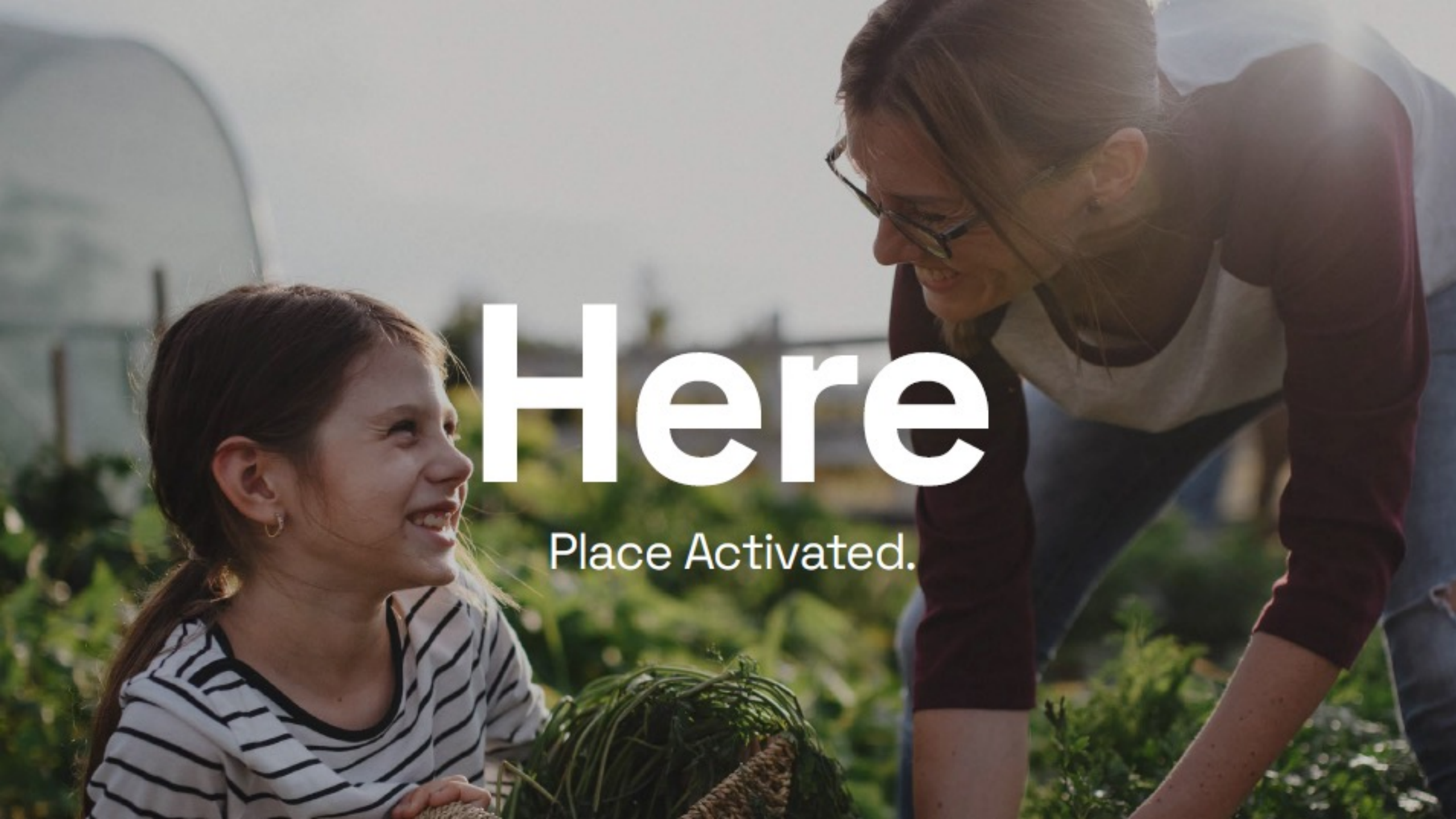
Ryan Frederick
Here


WHERE YOU
LIVE IS MUCH
MORE THAN A
PLACE.


IT IS THE MOST
IMPORTANT
DECISION YOU
WILL MAKE.

IT DETERMINES
YOUR BEST
HEALTH, SUCCESS,
FULFILLMENT.

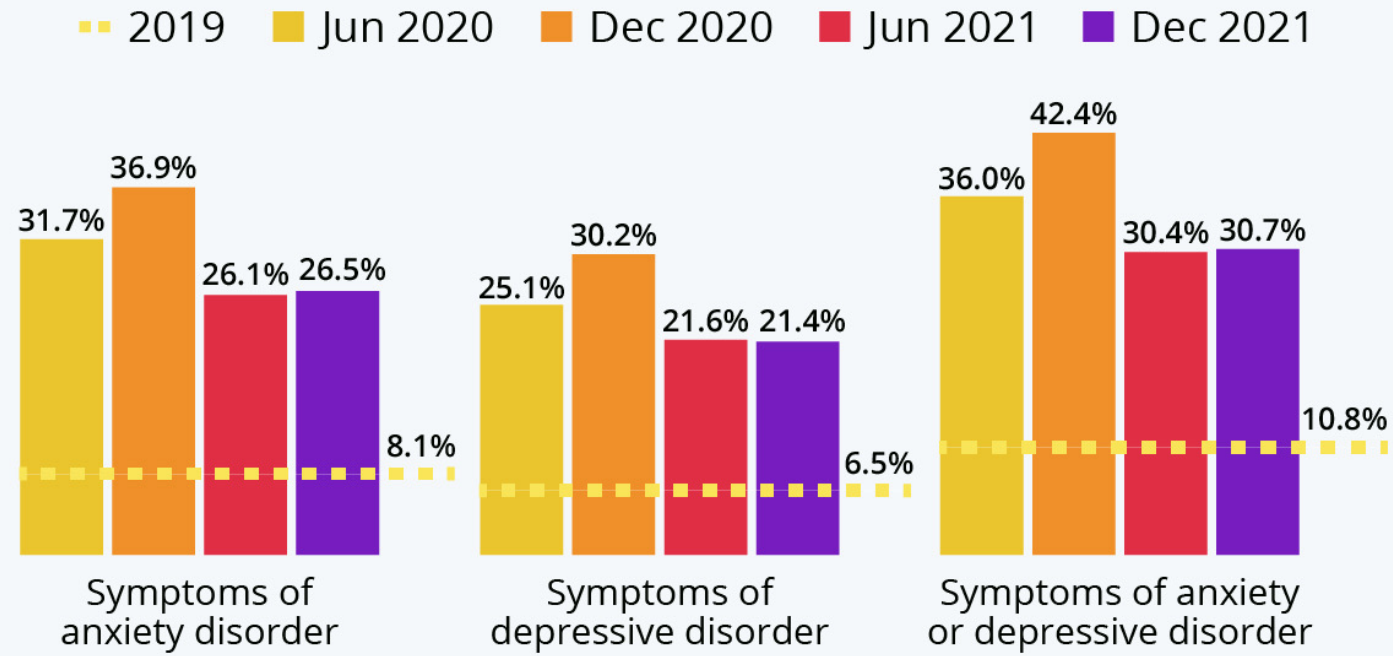
AND WHEN YOU
ARE AT YOUR BEST,
YOU ARE


Here
Place Activated.

Where Are We Today?
The Challenges

Pandemic Causes Spike in Anxiety & Depression

% of U.S. adults showing symptoms of anxiety and/or depressive disorder*



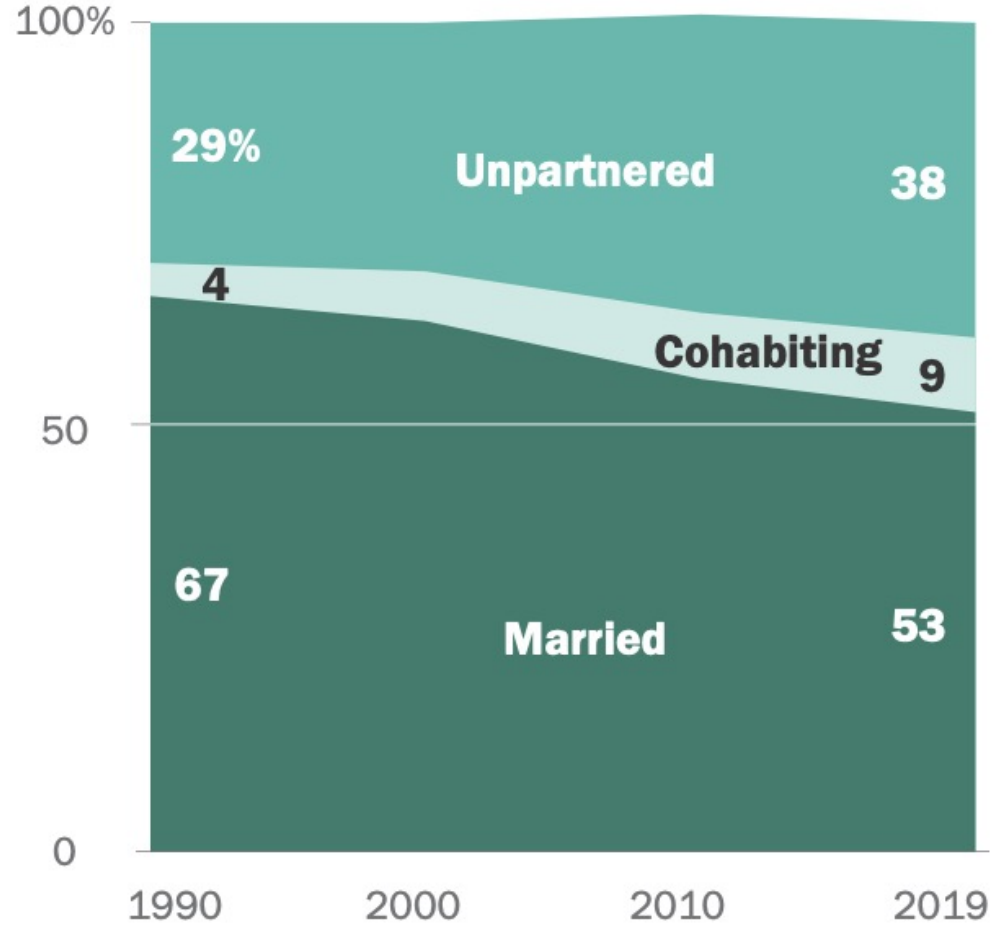
* Based on self-reported frequency of anxiety and depression symptoms. Derived from responses to Patient Health Questionnaire (PHQ-2) and the Generalized Anxiety Disorder (GAD-2) scale.

Sources: CDC, NCHS, U.S. Census Bureau

statista

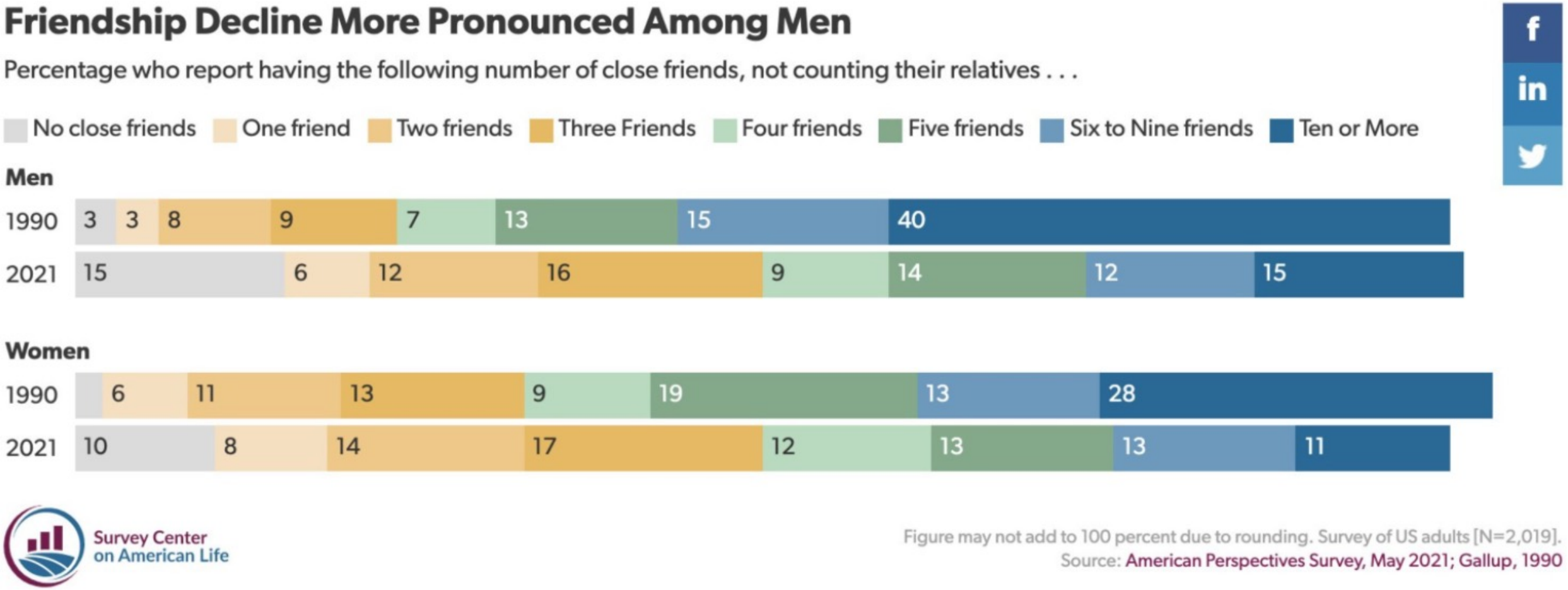
A rising share of U.S. adults are living without a spouse or partner

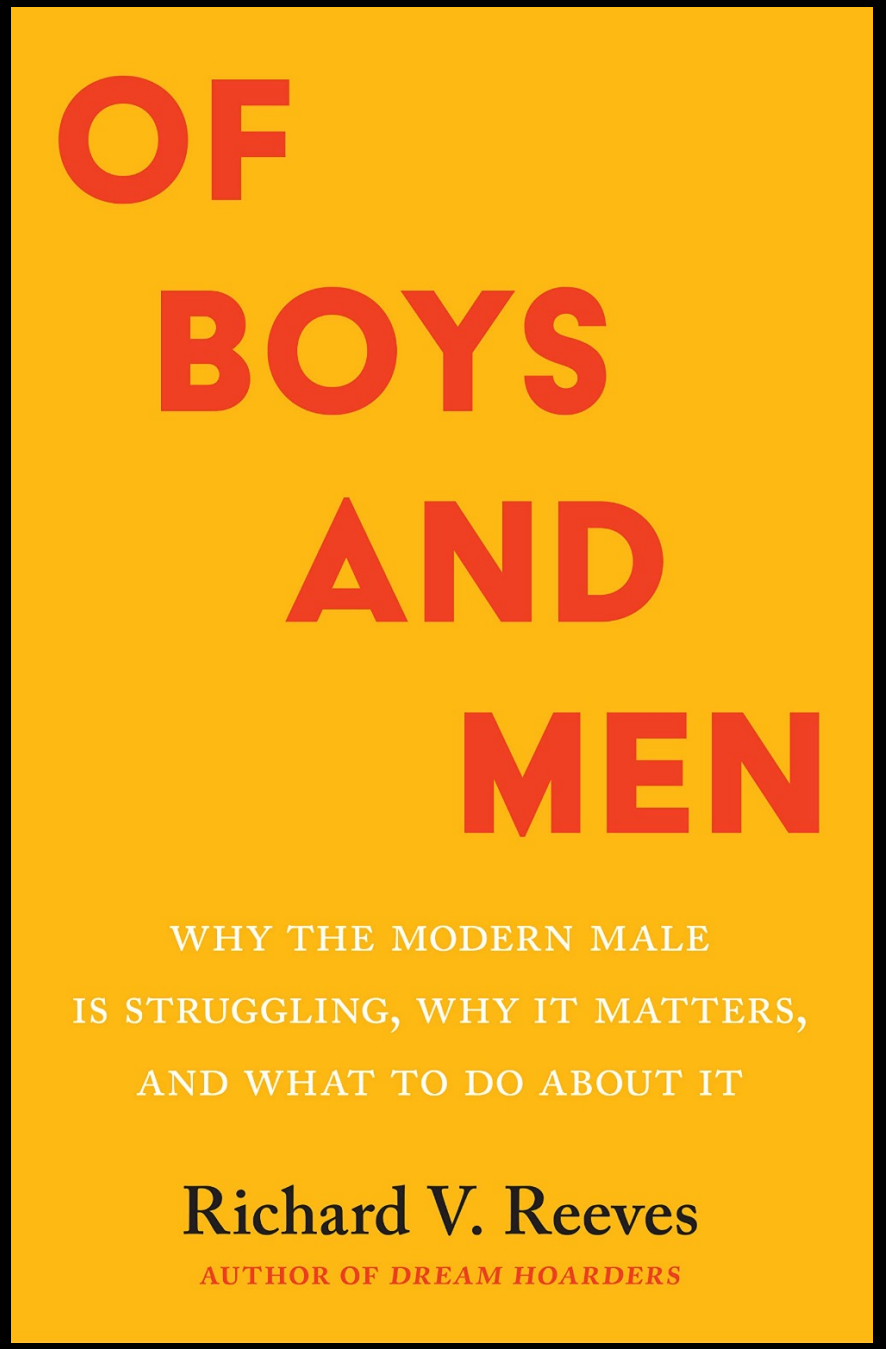
% of population ages 25 to 54 who are ...



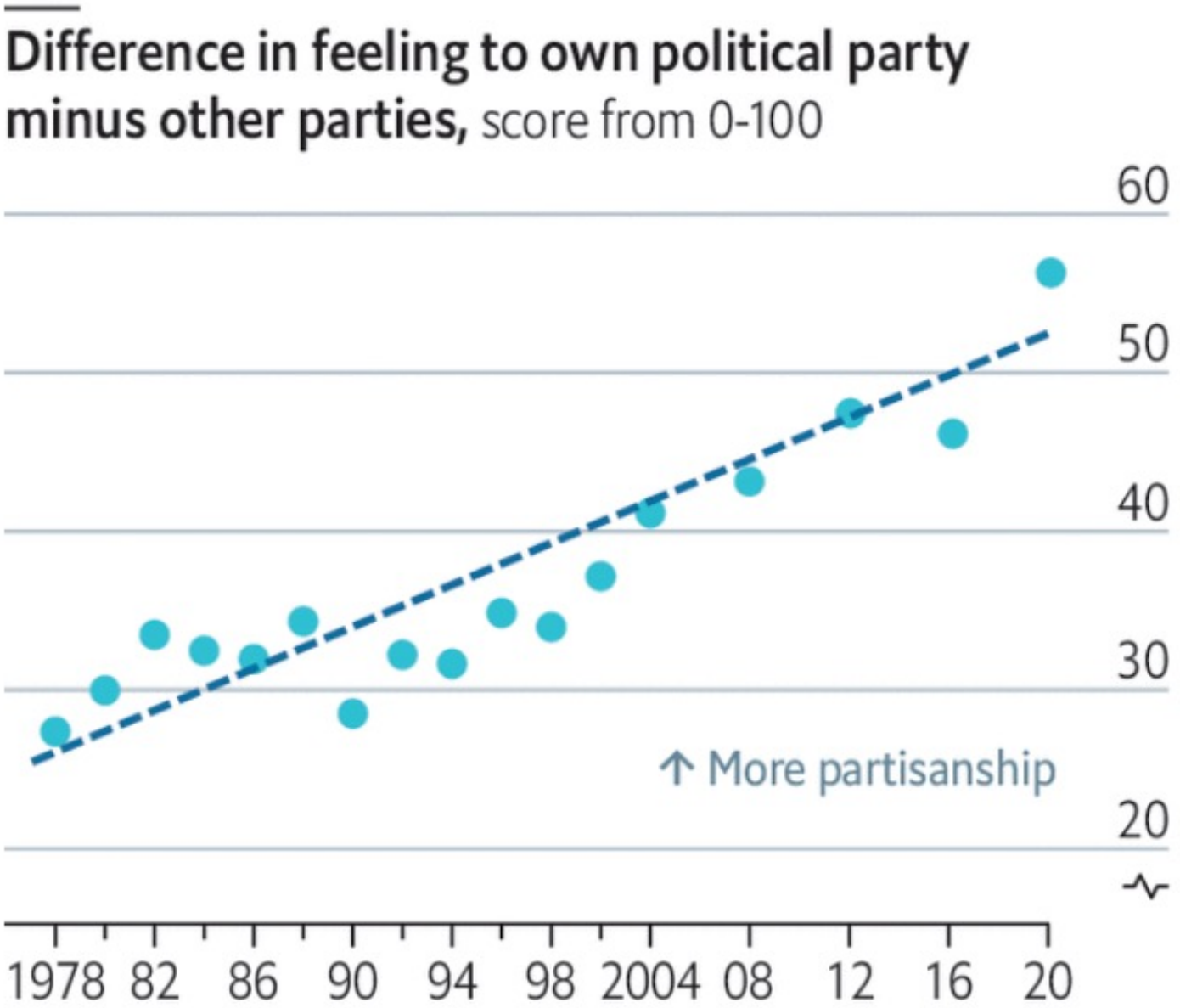
Note: Unpartnered adults are those who are neither married nor living with an unmarried partner.
Source: Pew Research Center analysis of 1990 and 2000 decennial census and 2010 and 2019 American Community Survey (IPUMS).
"Rising Share of U.S. Adults Are Living Without a Spouse or Partner"

The Age of Loneliness




OF
BOYS
AND
MEN
WHY THE MODERN MALE
IS STRUGGLING, WHY IT MATTERS,
AND WHAT TO DO ABOUT IT
Richard V. Reeves
AUTHOR OF DREAM HOARDERS

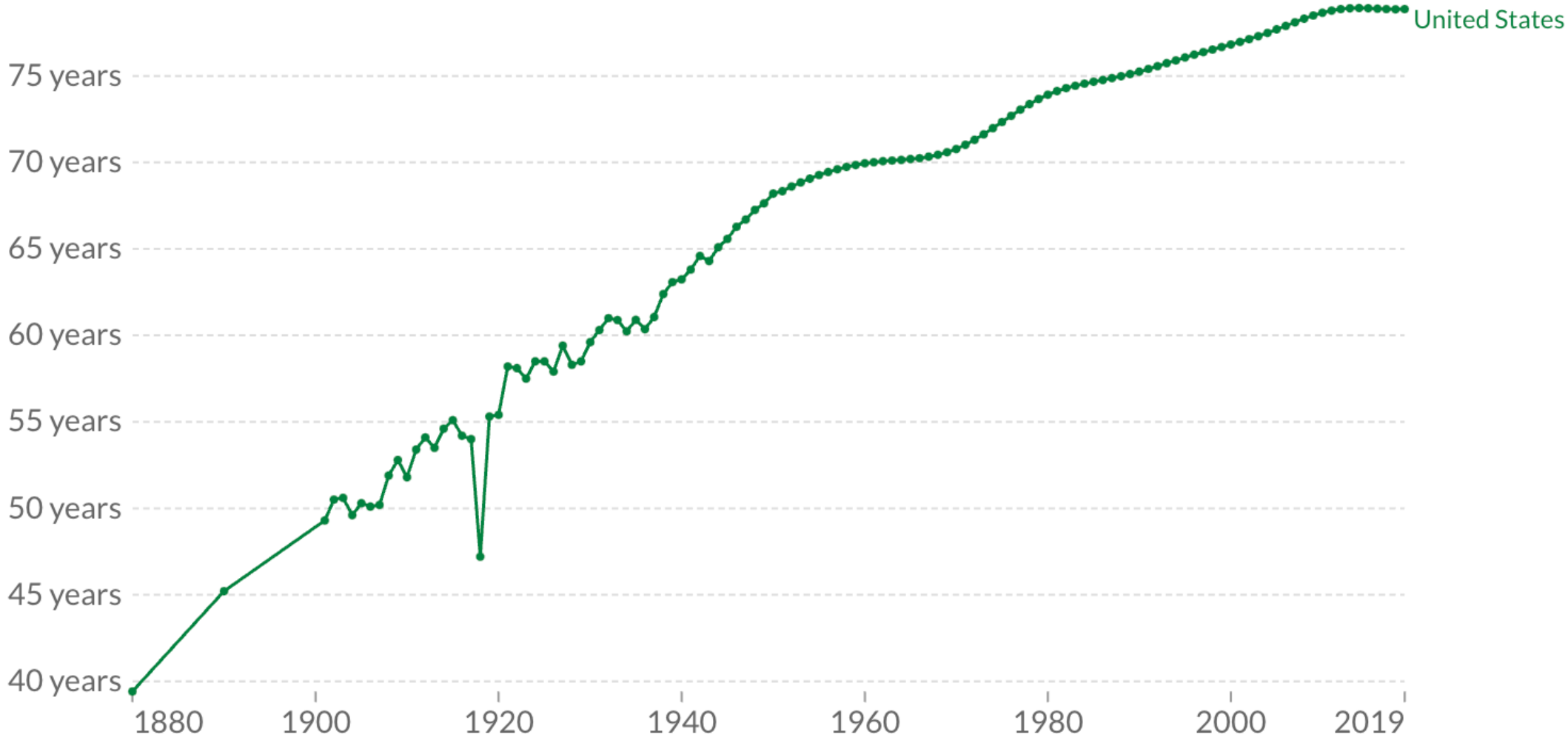
Rising Political Polarization and Self-Sorting



Source: Economist

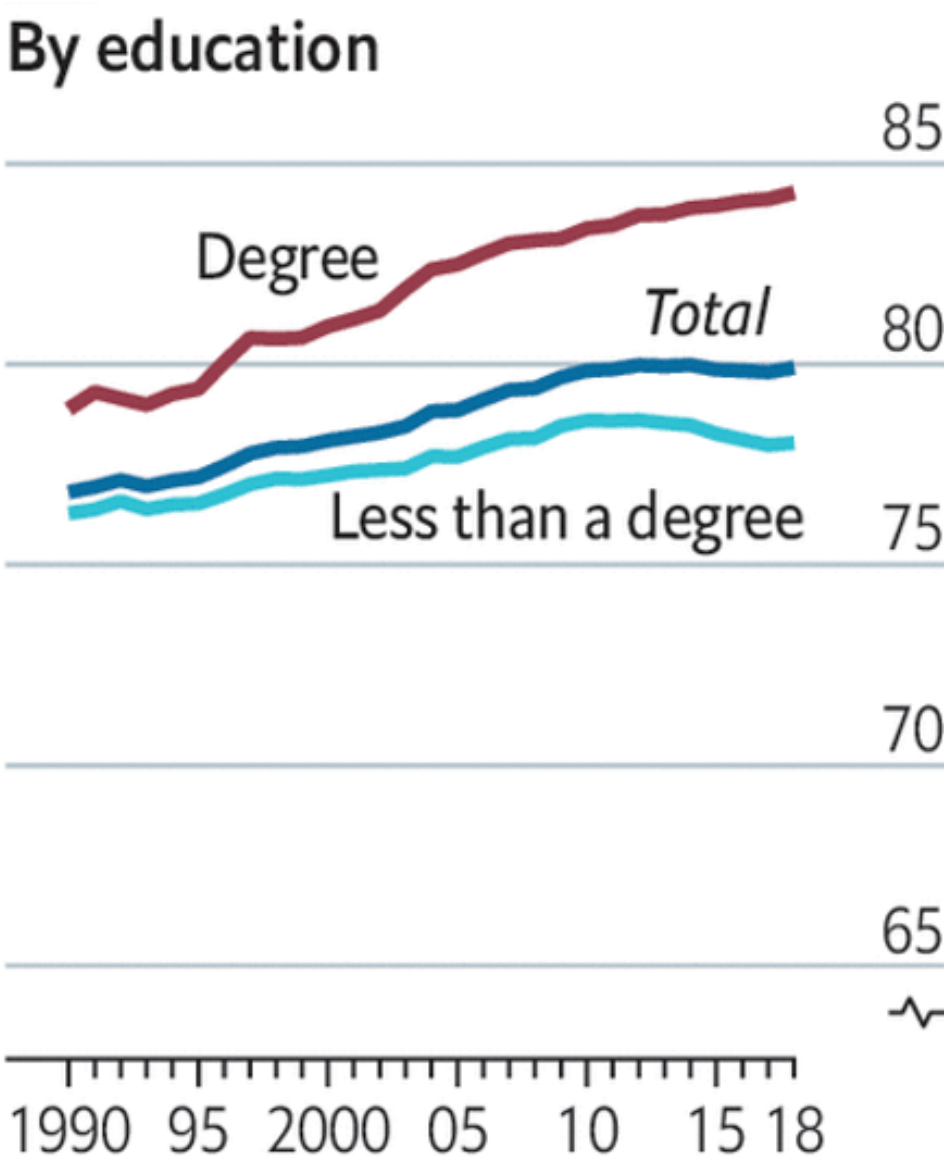
Where Are We Today?
The Good News

Life Expectancy Doubled in the 20th Century



Source: www.ourworldindata.org/life-expectancy

Growing Life Expectancy for Some

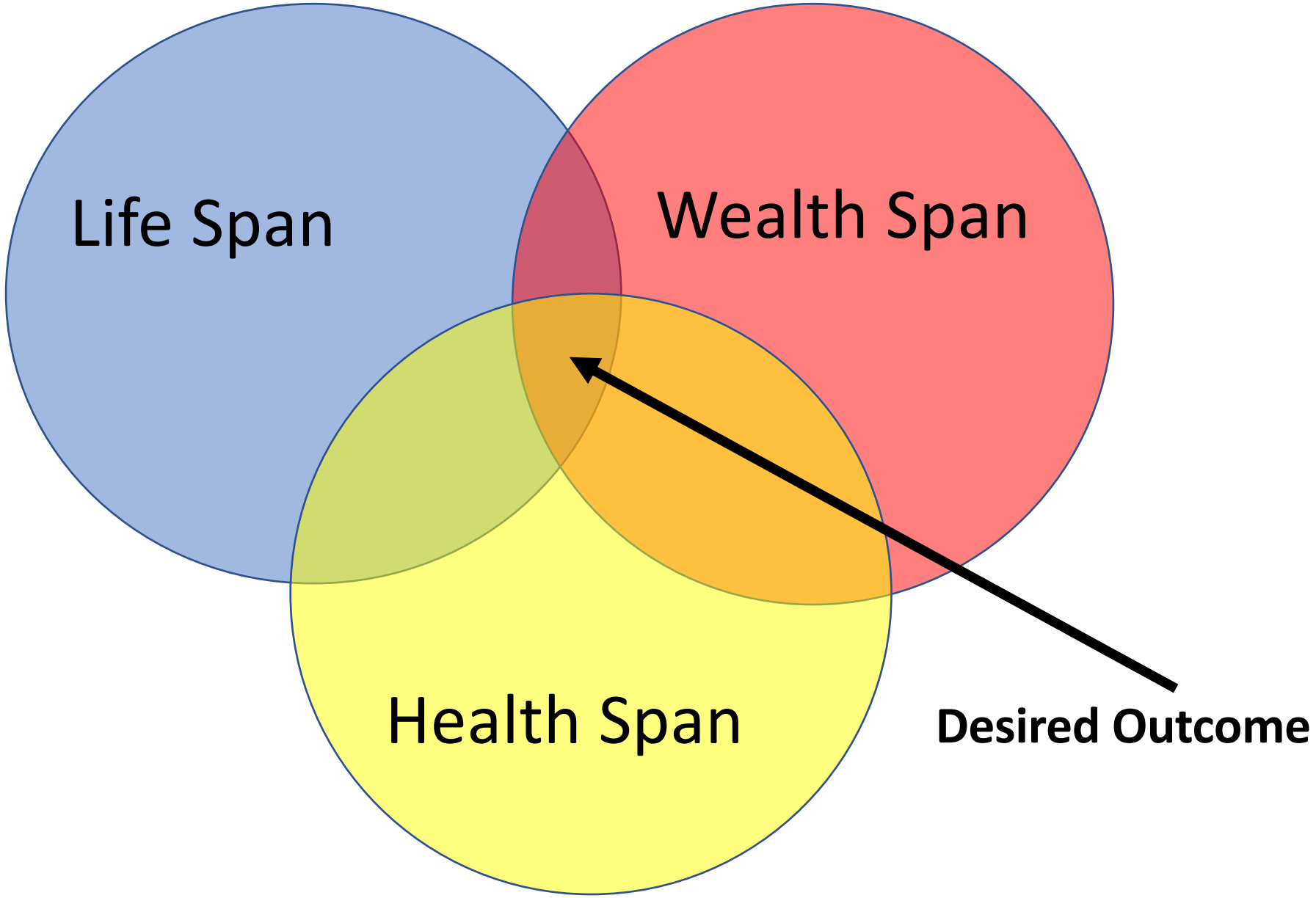


Source: Economist. Average life expectancy at age 25

Lifestyle >

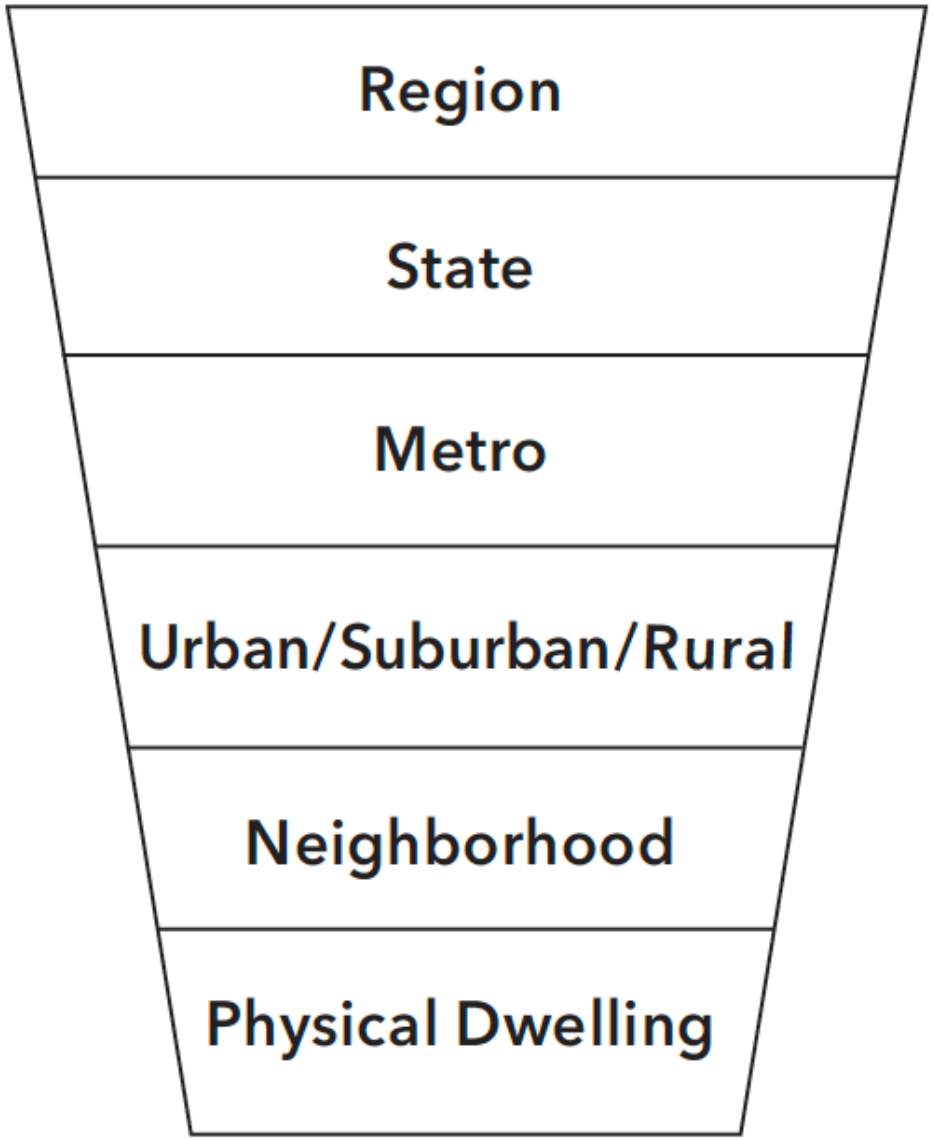
PURPOSE
SOCIAL
PHYSICAL
WELL-BEING
COMMUNITY
FINANCIAL
5 ELEMENTS of WELL-BEING
THE GALLUP-HEALTHWAYS WELL-BEING INDEX

11:45


Life Span
Wealth Span
Health Span
Desired Outcome

Place Matters… Particularly Over a Longer Life

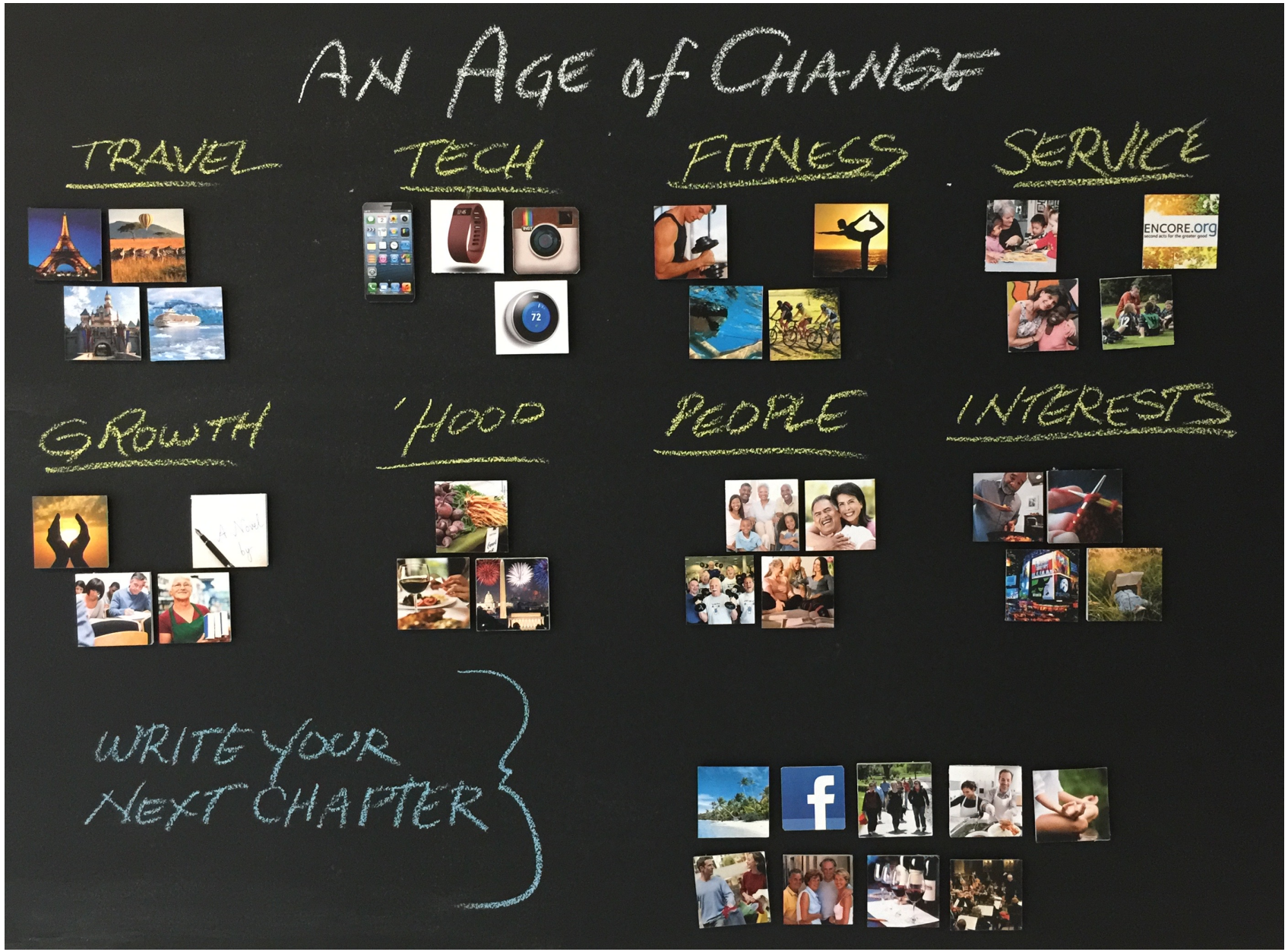
What Comprises Place



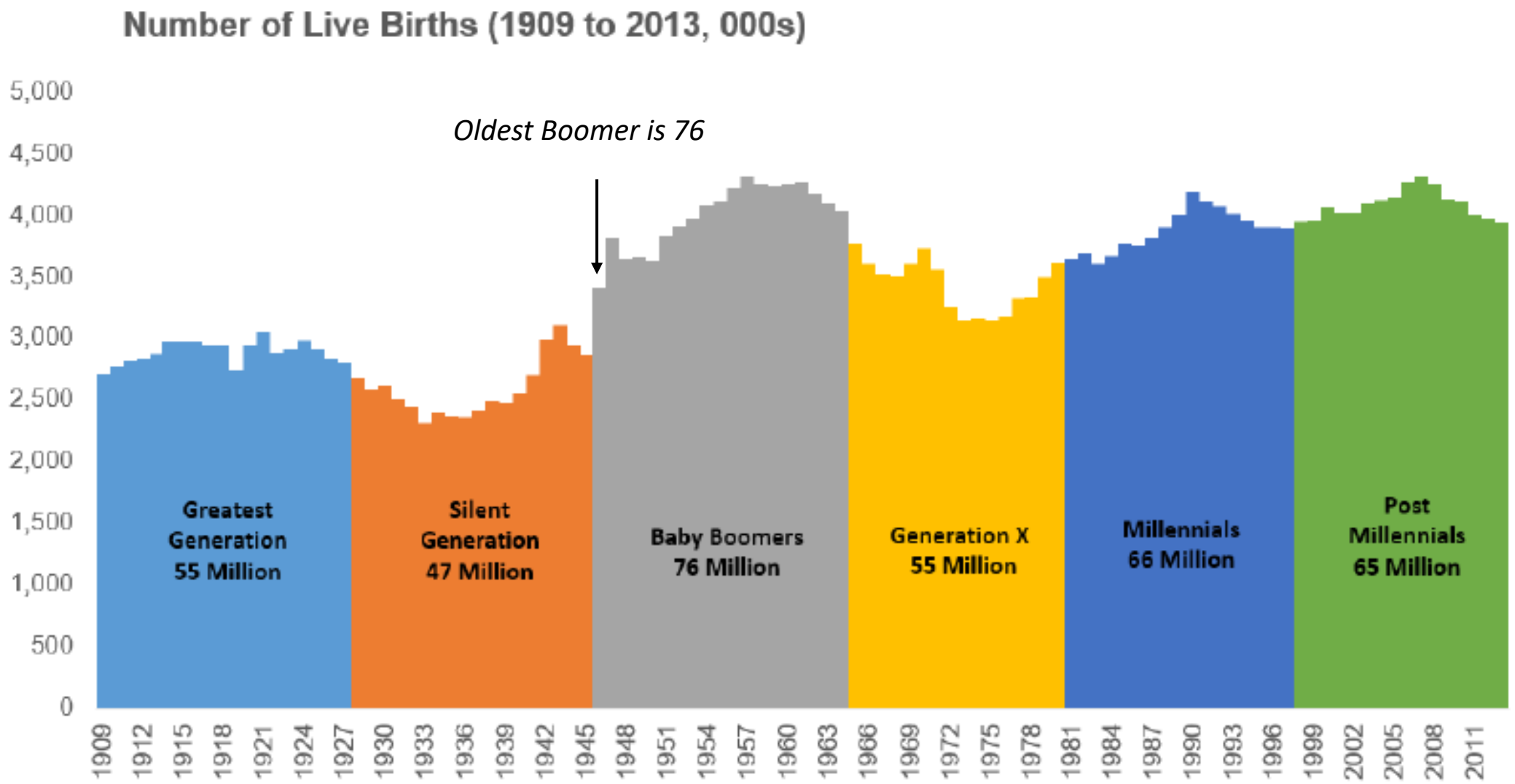
Source: *Right Place, Right Time*

The Opportunity:
As Professionals

#1: Provide More than Architectural Design Advice



Demographic Growth: Oldest Boomer is 76



#2: Incorporate Universal Design

Slip Resistant Tiles

Comfort Height Toilet

Shower with Built-In Seating And Glass Doors

In Unit Storage

Bath Tub in 2nd Bathroom

General Features:

- Low Glare Lighting
- Higher Electrical Outlets
- In-Unit High Speed Wireless Internet

Balcony

Pull Out Shelves

Ergonomic Hardware

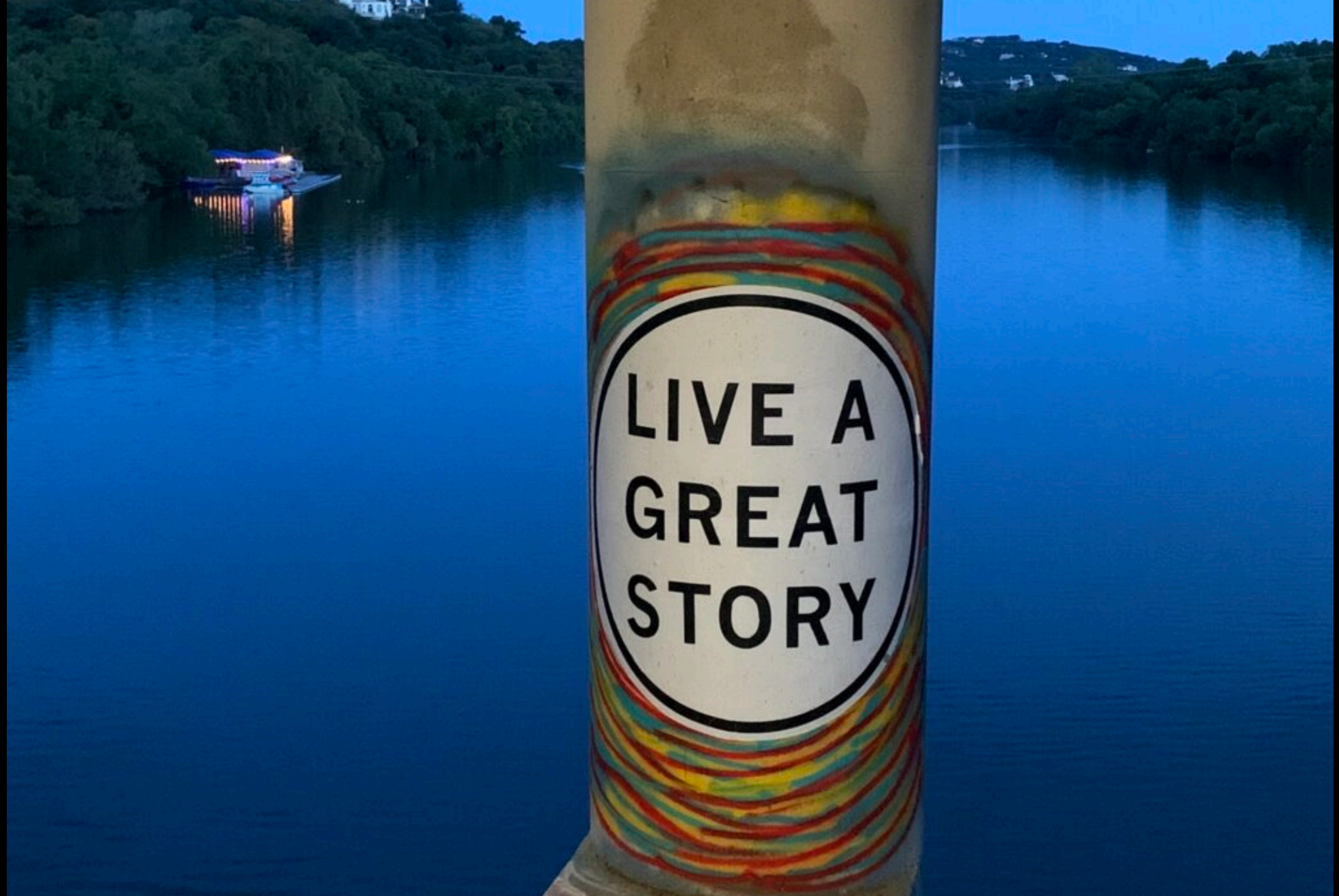
Built-In Wall Oven

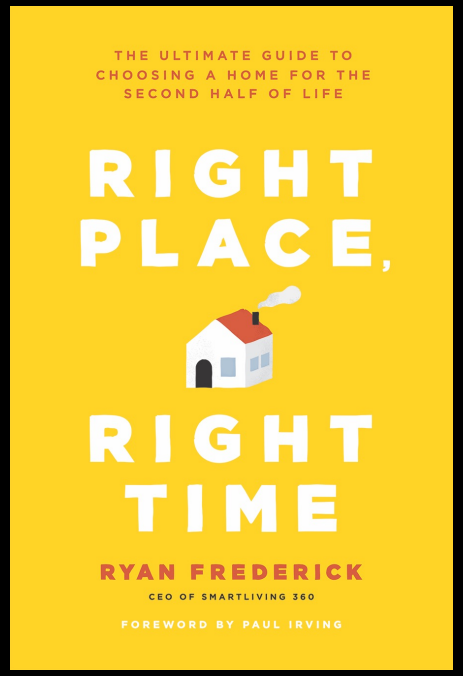
Under Cabinet Lighting

#3: Make Spaces Healthy

Source: Etsy Brooklyn office using biophilic design courtesy of NBC

The Opportunity:
As Individuals


LIVE A
GREAT
STORY



RIGHT PLACE, RIGHT TIME

ASSESSMENT

Are you in the right place for a long, healthy and financially secure life?

Let's Get Started

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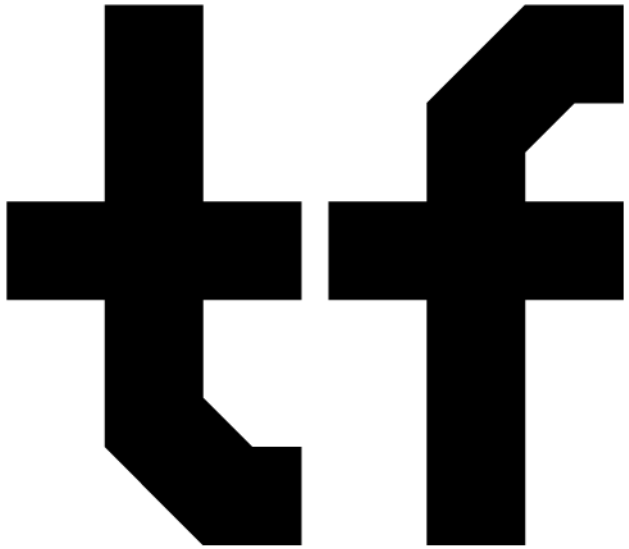

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EntreArchitect™

CONTEXT & CLARITY *Live*

VIDEO SIMULCAST

with

JEFF ECHOLS

& KATHARINE MACPHAIL

RYAN FREDERICK

Streaming LIVE every Thursday at 4:00 PM (ET) on Facebook, YouTube, LinkedIn, Twitter & Twitch

The EntreArchitect™ Community
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End of Day 2