



2008 SDA St. Louis Board

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SDA – St. Louis Chapter Monthly Meeting Minutes

Wednesday, November 19, 2008
Bob Staed, Ames & Gough
5 Key Tools for Office Administrators

Members Present:

Amanda Boyce – Mackey Mitchell
Pat Brown - KAI
Karen Dahl – Mackey Mitchell
Diane Klug – Parsons Brinckerhoff
Katheryne Morschl – McClure Engineering
Cindy Petzoldt – Mackey Mitchell
Cindy Risman – HERA Inc.
Bob Staed – Ames & Gough (Speaker)
Jean Tedesco – Tarlton
Kristine Tillitt – EDM Inc.
Danielle Weston – McClure Engineering

Guests Present:

Kimberly Elliott – Executive Defense
Technology
Jeff Kuennen - KAI

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1. The meeting began with informal networking and lunch.
 2. Fundraising - Poinsetta Sale begins today. Kimberly Hughes will be sending an email regarding the sale.
 3. Introduce Sponsor – Kimberly and Larry Elliott, Executive Defense Technology. Larry has 18 years as Parole & Probation Officer. Educate on crime prevention, personal safety, homes, and transitional areas (between buildings and parking lot). Anti-victimization – checked out parking lot at Engineer's Club – good lighting. Pay attention surrounding area. Works with law firms, hospitals, churches, personal. Group – RAD (Rape Aggression Defense) – 4 to 5 week session. Attack – Women 25% (rape) and Men 14% (murdered). Many thefts that we don't hear about.
 4. Voted on 2009 Board.
 5. Drawing for attendance prize from Executive Defense.

6. Board Elected – Jean Tedesco, President; Julie Finocchio, President-Elect; Kristine Tillitt, Vice President; Pat Brown, Treasurer; Karen Dahl, Secretary; Danielle Weston, Director.
7. Speaker – Bob Staed, Ames & Gough Risk Management. SDA member. Originally Law School – 1987. Private practice (civil) until joined HOK in 1994 and became General Counsel in 2000. Then became part of a 5-person management team for HOK Sport.
8. Presentation – 5 Key Tools for Office Administrators.
9. Managing the Prospecting & Marketing Processes – Can promise too much. Promises create expectations.
 - Website
 - Problem with wording such as “every” aspect – is that possible?
 - Setting expectations
 - Brochure
 - Does it meet standard of care?
 - Standard of Care – Duty to exercise ordinary and reasonable care
 - Below - Negligence
 - Best – Can you deliver?
 - Words can be guarantee if not careful
 - A vendor has a business card - can give non-employees authority.
10. Regulatory & Licensing Issues
 - If going outside of area of practice, be sure you understand the licensing issue in that state.
 - For example, Ohio has regulations on what your firm’s name can be.
 - Business cards – can be affected.
 - Florida requires license number on stationary.
 - If not properly registered, can be prohibited from collecting a fee.
11. Problem Areas
 - Responding to an RFP with contract. Risk and liability issues.
 - Attach proposal to contract.
 - Managing client expectations – Fast track. Releasing documents before fully coordinated.
12. Client Selection – Understand who doing business with.
 - Do homework
 - Internet Search
 - Dunn & Brad Street
 - Developer – LLC – Limited Liability
13. Claimant Identification by Frequency
 - Schools/colleges – highest/severity (Architects)
 - Land/Site – highest/severity (Engineers)
14. CNA Web Site (Profit to Risk)
15. ADA Amendment Act – 9/25/2008
 - Broadens disability definition. Rejected the notion that a person’s mental and/or physical impairment must severely restrict a person’s daily activities. Even if disability managed – still must accommodate the employee.
16. Told members that even if update member information, will need to call SDA National to update the local chapter’s list serve.
17. Danielle Weston adjourned the meeting at 1:00 PM. Holiday Luncheon will be December 17, 2008 at Point of View, 720 Olive, 30th Floor, St. Louis, MO 63101.