

AIA Small Firm Exchange 2024 Annual Report

December 2024 - February 2025

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Chair Message

Greetings,

As we closed out 2024, the AIA Small Firm Exchange (SFx) is proud to release our annual report, reflecting a year marked by collaboration, growth, and meaningful education. It has been an inspiring journey, and I am energized by the momentum propelling our efforts. This year, we focused on defining what the "Practice of Architecture" means in 2024. We explored how technology is shaping our work, examined our roles as architects and creatives, and reflected on the evolving landscape of our profession.

The SFx is powered by a dedicated Board and State Representatives from 43 states, who meet regularly to advance our mission. Together, we've created a collaborative structure that fosters dialogue, advocacy, and growth:

- Executive Committee: Steered the key topics and advocacy efforts.
- Board: Facilitated the work by developing content, shaping output, and deepening discussions on vital issues.
- State Representative Topic Calls: Focused on practice-based education and open conversations to support members in their day-to-day work.

Small firms have a unique capacity for direct mentorship, and the SFx has worked tirelessly to leverage that strength. This year we have shared valuable content through our State Components, AIA Community Hub (www.aia.org/sfx), and local/regional Small Firm Exchange groups. As 75% of architecture firms are small (have fewer than 10 employees), we are proud to contribute to a profession that values diversity, creativity, community, and advocacy.

2024 was a transformative year as we've reexamined the very essence of "practice" in small firms today. We structured our discussions around the typical project flow—concept through construction—and explored topics like integrating AI into small firms, creating a Small Firm Guide to AIA24, and addressing critical issues such as firm finances and liability during construction. We also raised important questions about small firm representation at the national level, including our advocacy for an AIA Small Firm Award program, in response to the notable number of large firms dominating the AIA Small Project Awards. Our advocacy will also explore the results of the 2024 Firm Survey Report, including the 50% reduction in share of architectural billings at small firms.

Some of our key initiatives this year included:

- Advocating for better representation of small firms on the Strategic Council.
- Submitting a letter regarding proposed changes to AIA membership categories and their impact on small firms.
- Revising our meeting structure to ensure more time and resources for creating practical outputs that directly benefit small firm members.

Looking ahead to 2025, we are committed to the following priorities:

- Focusing on Brand, Marketing, and Storytelling to elevate the visibility of small firms.
- Continuing our Interview Series to highlight the voices and experiences of small firm leaders.
- Increasing our presence at AIA25, advocating for small firm priorities and strengthening our network.

The role of SFx in shaping the future of architecture cannot be overstated. Our questions and initiatives matter because they amplify the unique challenges and opportunities facing small firms. By continuing to raise our collective voice, we ensure that the needs of small firm architects are heard at every level of the AIA and beyond.

Be part of the SFx by participating in your local chapter (or starting one), becoming a SFx state rep, or be a voice for small firms by getting involved in other AIA Knowledge Communities and Member Groups. Thank you for your ongoing commitment and dedication. Together, we are building a stronger, more resilient profession.

With gratitude,

Dana Ellis
2024 Chair, AIA Small Firm Exchange
dana@outpoststudioco.com

The mission of the AIA Small Firm Exchange (SFx) is to advance the mutual interests of architects practicing in small firms. The objectives of the AIA SFx are three-fold:

Curate and disseminate the most pertinent resources and information, from the AIA & elsewhere, that benefit small firms.

SFx Structure

Board: Facilitated the work by developing content, shaping output, and deepening discussions on vital issues.

A screenshot of a Zoom meeting grid with 20 participants. The participants are arranged in a 5x4 grid. The names of the participants are visible in the bottom left corner of each tile. The participants are: Dargun, Ortuna; Scott, Busby; Jerem, Russell; Lewis, Matthew; Jason, Hsiao; Eyal, Leventowski; Dora, Eli; Ernie, Schmitt; Julie, Carpenter; Josiah, Zivick; David, Bloomberg; Nathan; Devin, Corbett; Kallie, McQuirk; Karim, Patinkin; Angie, Moxson; Ben, Glen; Edward, Jeffrey; Bill, Peterson; Emily, Phipps; Michael, Hoffman; Kait, Ng; Ken, Schneck; Jon, Wright; Kait, Borek.

SFx Monthly Call

PRACTICE

- AIA Community Hub: Small Firm Exchange (SFx) aia.org/sfx
- Instagram: @aia_sfx
- YouTube: www.youtube.com/@aiasfx8476

Small Firm Exchange

AIA Member group

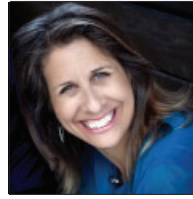
SFx Board



Chair (2024)
Dana Ellis, AIA
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Chair-Elect (2025)
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Past Chair (2023)
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Outreach Vice Chair (2024)
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Flow Design
Salem MA



Climate Action Vice Chair (2024)
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All-Calls Vice Chair (2024)
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Board (2022-2024)
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Eglin & Bresler Architects
Tucson, AZ



Board (2023-2025)
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Smee + Busby Architects
Knoxville, TN



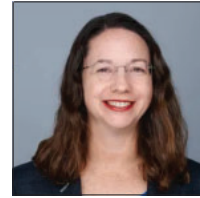
Board (2022-2024)
Julie Carpenter
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AIA Cincinnati
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Board (2022-2024)
Christian Jordan, AIA
cjordan@pjarch.com
PJA Architecture
Drexel Hill, PA



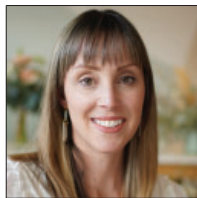
Board (2024-2026)
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Board (2024-2026)
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Board (2023-2025)
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Board (2022-2024)
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AIA Staff Liaison
Kathleen McCormick
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Small Firm Exchange

AIA Member group

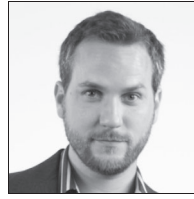
SFx State Representatives



Alabama (2022-2024)
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Huntsville, AL



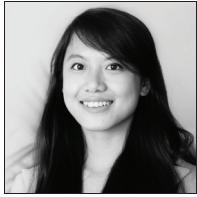
Alaska (2024-2025)
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Arizona (2022-2025)
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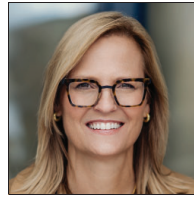
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Small Firm Exchange

AIA Member group

SFx State Representatives



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Massachusetts (2023-2026)
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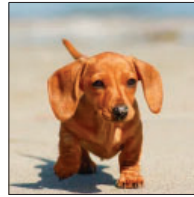
Minnesota (2023-2025)
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Minneapolis, MN



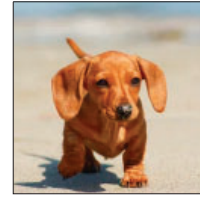
Mississippi (2023-2024)
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Montana
Vacant



Nebraska
Vacant



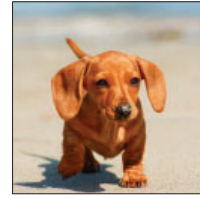
Nevada (2023-2025)
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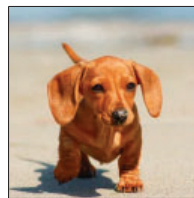
New Mexico
Vacant



New York (2024-2025)
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North Carolina (2022-2025)
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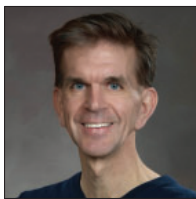
North Dakota
Vacant



Ohio (2023-2026)
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Cincinnati, OH



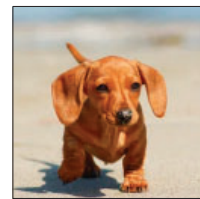
Oklahoma (2023-2026)
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Oregon (2024-2025)
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Pennsylvania (2022-2025)
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Puerto Rico
Vacant

Small Firm Exchange

AIA Member group

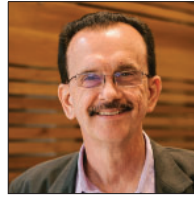
SFx State Representatives



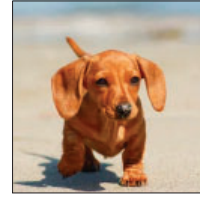
Rhode Island (2023-2026)
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South Carolina (2024-2025)
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South Dakota (2023-2026)
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RSArchitects
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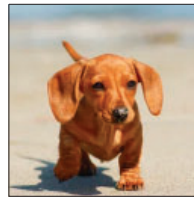
Tennessee
Vacant



Texas
Vacant



Utah (2022-2025)
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Process Studio
Salt Lake City, UT



Vermont
Vacant



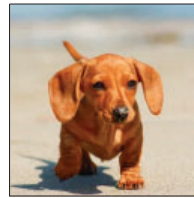
Virginia (2023-2026)
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West Virginia
Vacant



Wisconsin (2023-2024)
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Mequon, WI



Wyoming
Vacant

2024 Calendar

2024 Year at a Glance

All meetings are at 12:00pm EST and are 1 hour unless otherwise noted

<p>January</p> <p>SFx Mission + Goals</p> <p>1/11 1 hr: ExCom 1/18 2 hrs: Board 1/25 2 hrs: All Call</p> <p>Exchange:</p> <ul style="list-style-type: none"> • Introductions • Areas of Expertise • Outreach Goals <ul style="list-style-type: none"> ○ Board to Assign Leads 	<p>February</p> <p>The Vision Sketch + Iterate</p> <p>2/1 ExCom 2/8 All Call - AI 2/15 Board</p> <p>Exchange:</p> <ul style="list-style-type: none"> • Creative Sharing • Technical Resources • Outreach Goals <p>All Call Presenters: Bill Martin and Brian Penschow</p>	<p>March</p> <p>Starting a Small Firm</p> <p>3/7 ExCom 3/14 All Call 3/21 Board</p> <p>Exchange:</p> <ul style="list-style-type: none"> • Storytelling • Resources • Outreach Goals <ul style="list-style-type: none"> ○ Conference <p>All Call Collaborator: AIA Trust</p>
<p>April</p> <p>Firm Development Work + Practice</p> <p>4/4 ExCom 4/11 All Call 4/18 Board</p> <p>Exchange:</p> <ul style="list-style-type: none"> • Storytelling - Earth Month • Integrating 2030 in practice <p>Presenter: Nate Kipnis FAIA + Bruce Fallon AIA</p>	<p>May</p> <p>Business School</p> <p>5/2 ExCom 5/9 All Call 5/16 Board</p> <p>Exchange:</p> <ul style="list-style-type: none"> • Education - LUs • Resources • Outreach Goals <p>All Call Presenter: Enoch Sears - Practice of Architecture</p>	<p>June</p> <p>AIA24 Conference Connect - D.C.</p> <p>6/6 ExCom 6/13 All Call 6/20 Board</p> <p>Exchange:</p> <ul style="list-style-type: none"> • Meet-up • Small Firm Roundtable • Gather • Report • Outreach Goals

2024 Calendar

<p>July</p> <p>Small Firm Typologies</p> <p>7/4 ExCom 7/11 All Call 7/18 Board</p> <p>Exchange:</p> <ul style="list-style-type: none"> Types of Deliveries: Developer, Design-Build Resources Outreach Goals <p>All Call Presenter: Alison Agley AIA, J. Robert Hillier FAIA, Joshua Zinder AIA</p>	<p>August</p> <p>Grassroot Connections</p> <p>8/1 ExCom 8/8 All Call 8/15 Board</p> <p>Exchange:</p> <ul style="list-style-type: none"> Resources Opportunities in AIA Outreach Goals <p>All Call Presenter: AIA Leadership- Evelyn Lee</p>	<p>September</p> <p>Tending the Garden</p> <p>9/5 ExCom 9/12 All Call 9/19 Board</p> <p>Exchange:</p> <ul style="list-style-type: none"> Education - LUs Resources Outreach Goals <p>All Call Presenter: Charrette Venture Group - Erin Murphy AIA</p>
<p>October</p> <p>Managing Risk</p> <p>10/3 ExCom 10/10 All Call 10/17 Board</p> <p>Exchange:</p> <ul style="list-style-type: none"> Liability Resources Outreach Goals <p>All Call Collaborator: CCA KC</p>	<p>November</p> <p>Telling Your Story</p> <p>11/7 ExCom 11/14 All Call 11/21 Board</p> <p>Exchange:</p> <ul style="list-style-type: none"> Brand Development Techniques + Advocacy Resources Outreach Goals 	<p>December</p> <p>Reflections</p> <p>12/5 ExCom 12/12 All Call 12/19 Board</p> <p>Exchange:</p> <ul style="list-style-type: none"> Storytelling Roundtable Retirement Planning Charitable Gift Suggestions + Advocacy (ArchiPac?)

2024 Recap + Resources

The SFx built on the momentum of prior years and made the goal of distributing content on a regular basis. The following pages showcase what we were able to share with the State Components.

Small Firm Exchange All Call Summary 02.2024

AIA Member group



AI for Small Firms

02.08.24 Presentation: *How to leverage your small firm's technology and creativity using AI (for renderings and presentations to clients). Architects use of AI for productivity and efficiency (images only - not construction drawings, etc.)*

Presented by: *William J Martin AIA and Brian Penschow AIA*

Key Takeaways

- ✓ AI can get you to 80% - you'll need to get the images the rest of the way
- ✓ Much of the software is free or "rentable, so you don't need to spend a lot of money
- ✓ You don't need a powerful computer
- ✓ There is a learning curve... you'll need to give it a couple months
- ✓ Be careful about the fine print: image copyright
- ✓ If using AI generated images, Architects must disclose this (AI created, prompted by you)

Small Firm Impacts

- High-quality work at a lower cost
- You can do this! No need for technical knowledge. Dive in!
- Creates many images quickly - great for small firms (can get you the job!)

Links/Resources

Recorded Presentation: [link](#)

Upcoming All Calls

03.14.24 *starting a firm* 04.11.24 *firm development* 05.09.24 *business school*

Small Firm Exchange All Call Summary 03.2024



Starting a Firm

03.14.24 Brief Intro to the AIA Trust:

"The best kept secret at the AIA" and how members can access the many resources available for starting/running architecture firms.

Guest: *Elizabeth Wolverton – Executive Director AIA Trust*

Maintaining the humanity of design resides with small firms

– Dana Ellis, AIA SFx Chair

Links/Resources

Recommendations from the SFx

[The Architect's Guide to Small Firm Management -](#)

[The EMyth Architect](#)

[Managing by the Numbers](#)

[Art's Principles](#)

[Law for Architects](#)

[Who](#)

[The Pumpkin Plan](#)

[Duct Tape Marketing](#)

[Profit First](#)

[Radical Candor](#)

Resources from AIA Trust

[Start + Run Your Own Firm](#)

[Tips for Launching a Successful New Practice](#)

[Starting a Successful Practice](#)

[Running a Firm](#)

SFx Spotlight

[Dana Ellis, AIA Shares her Journey to Opening her Firm](#)

[Bart Shaw, FAIA Shares his Journey to Opening an Award Winning Practice](#)

Upcoming All Calls

04.11.24 *firm development*

05.09.24 *YAF*

06.13.24 *A'24*

Small Firm Exchange All Call Summary 04.2024

AIA Member group



Small Firms and the Framework for Design Excellence

04.11.24 Presentation: *How to kickstart sustainable practices within your firm's design process. Tips to begin incorporating the values and performance metrics of the Framework for Design Excellence.*

Presented by: *Nate Kipnis FAIA, Bruce Fallon AIA*

Key Takeaways

- ✓ Rising Temperatures are a wake up call for Architects to design buildings that not only look good, but perform
- ✓ Many AIA Awards Programs have incorporated Framework Metrics
- ✓ It can be overwhelming... Find just one thing that can be implemented to start
- ✓ One of the best places to start is with the "[Design for Energy Toolkit](#)"
- ✓ Many Case Studies are documented on the Framework page and COTE Top 10
- ✓ Be sure to check out Nate and Bruce present on this topic at AIA24! **WE307: Elevating Design: Small Firms and the Framework for Design Excellence**

Resources/Links

AIA Resources:

[AIA 2030 Commitment](#)
[AIA Framework for Design Excellence](#)
[Architect's Guide to Building Performance \(2019\)](#)
[Leveraging Energy Transparency \(2019\)](#)
[Blueprint for Better Website](#)

Additional Resources:

[Zero Tool by Architecture 2030](#)
[Target Finder by EPA](#)
[Getting to Zero Database](#)
[IPCC Global Warming of 1.5 °C](#)
[Architecture 2030](#)
[Carbon Smart Material Palette](#)
[Net Zero Ready DOE Website](#)
[International Living Future Institute Zero Energy Site](#)
[Passive House PHIUS+Source Zero](#)
[USGBC LEED Zero](#)
[Tally Carbon Calculator](#)
[Solar Decathlon](#)

Upcoming All Calls

05.09.24 Business of Architecture 06.13.24 Small Firm Typologies P.1 07.11.24 SFT P.2

Small Firm Exchange All Call Summary 05.2024

AIA Member group



Small Firms and the Business of Architecture

05.09.24 Presentation: *A discussion on the techniques surrounding how architects communicate their value to clients.*

Speaker: *Enoch Sears, AIA
Business of Architecture*

Key Takeaways

- ✓ "Small firms are the voice of design in our communities"
- ✓ How you market your firm matters. You **sell** the way that you **buy**.
- ✓ Your staff is an investment – do not hire cheaply.

BoA Podcasts

- ➔ [Success Principles for Leading a Firm](#)
- ➔ [Know Your Firm's Financial Performance](#)
- ➔ [The Value of an Architect](#)

Small Firm Impacts

- Firms who operate without a solid business foundation will be consumed or run out of business by firms that do.
- A framework for running the business for clearing the obstacles to free your firm to put forth its best work and get the fulfillment, freedom and financial reward small firm owners deserve in their practice.

Links/Resources

Curated Playlist featuring SFX Board Member Interviews: by Darguin Fortuna, AIA, NCARB Principal, Flow Design Architects

https://youtube.com/playlist?list=PLqokS3a08D5ls_Jv7xaSFIPtLrc11WWfh&si=iCHBkB7_FFFVNix8

Upcoming All Calls

06.13.24 AIA24 Conference 07.11.24 Small Firm Typologies 08.08.24 Evelyn Lee, FAIA '25 AIA President



Architect (Also) as Developer: Growth, Financial Stability, and Better Project outcomes

7.11.2024 Presentation/Discussion:

Discussion of architects developing their own projects

Facilitated by: *Joshua Zinder AIA, Robert J Hillier, FAIA*

Key Takeaways

- ✓ Particularize the variables relevant to architects considering establishing a real estate development sideline.
- ✓ Leverage this information to create pitch decks for investors.
- ✓ Describe the risks inherent in the real estate development sideline and identify compatible community and industry stakeholders.
- ✓ Identify a variety of development models and understand the basics of financial structures of development, including cap rates, equity allocation, refinancing, proformas, and economic analysis.
- ✓ Apply the architect's skillset and creative problem-solving to real estate development challenges for direct personal financial impact.
- ✓ Tell a story and make returns easy to understand. Keep proforma flexible and as simple as possible. Model an exit strategy. Don't overwhelm prospective investors with too many numbers. Don't make claims that cannot be quantitatively substantiated.

Resources/Links

Sample Proforma:

tinyurl.com/aia-proforma

Architect (Also) as Developer Presentation (AIACNJ):

<https://youtu.be/qA4r2OwawRg?feature=shared>

Creative Practice Article

<https://www.aia.org/article/entrepreneurship-architects-strategies-creative-practice>

Contacts:

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Upcoming All Calls

Small Firm Exchange All Call Summary 09.2024

AIA Member group



Tending the (Financial) Garden

9-12-24 Presentation: *Financial Management Advice for Small Firms*

Presented by: *Erin Murphy, AIA*
Senior Management Consultant, Charrette Venture Group
erin@charrettevg.com

Key Takeaways

- ✓ Time management is important, including time sheets, and task management
- ✓ Outside consultants can be worth the investment – bookkeeper, payroll service, etc
- ✓ Track project and firm finances monthly, quarterly, and annually
- ✓ Forecast firm finances and develop operational revenue goals
- ✓ Determine annual expenses and develop an annual budget
- ✓ Review annual financial trends, including cash flow and profitability

Small Firm Impacts

- Financial management strategies can be useful for small firms to increase efficiency and profitability
- These tools are as valuable for small firms as for large firms, so they are worth the effort to incorporate into your process.

Links/Resources

Erin is available to give her presentation to state or local SFX groups

Book Recommendation: *The Architect's Guide to Small Firm Management: Making Chaos Work for Your Small Firm*, by Rena Klein, FAIA

<https://www.amazon.com/Architects-Guide-Small-Firm-Management/dp/0470466480>

Upcoming All Calls

10.10.24 *managing risk* 11.14.24 *telling your story* 12.12.24 *reflections*

Small Firm Exchange All Call Summary 10.10.2024

AIA Member group



Construction Administration

CCA (Construction Contract Administration)
Knowledge Community

10.10.24 Presentation/Discussion: *Discussion of pressing areas of concern for small firms during CA.*

Facilitated by: *Michael Zensen AIA, Gustavo Lima AIA, Tyler Schaffer AIA*

Key Takeaways

- ✓ Discussed advantages and disadvantages of Contractor CA Software for submittals, meeting minutes, etc.
- ✓ Emphasized the importance of pre-construction meetings to establish project expectations and communication protocol.
- ✓ Deliberated challenges managing Client/GC/Architect relationships during construction, such as contractors engaging in direct client communication suggesting and implementing changes on design.
- ✓ Debated the benefits and deficiencies of various fee structures for CA.
- ✓ Proffered strategies for building relationships with Contractors and Clients through the construction process.
- ✓ Discussed ways to manage change orders and design revisions during construction.
- ✓ Many presented methodologies for creating a team mentality with the contractor, and collaboration with subcontractors for a better, more efficient process and product.

Resources/Links

CCA KC:

[Construction Contract Administration KC on AIA Community Hub](#)

Fee Consideration Resource:

[Fee Considerations of CCA](#)

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Upcoming All Calls

11.14.24 Telling Your Story 12.12.24 Reflections

Small Firm Exchange

AIA Member group

SFx at AIA24



AIA24 SFx Forum



2024 Annual Board Meeting at AIA24



"Taking Care of Business: Entrepreneurship vs Intrapreneurship" at AIA24

SFx curated a Small Firm Guide tot AIA24, hosted a hybrid board meeting on Wednesday, a sold out Small Firm Meetup at the AIA Booth, a popular SFx Forum on Saturday, as well as collaborating with the Young Architects Forum and Large Firm Roundtable on the Taking Care of Business workshop.



AIA24 SFx Meet-up

AIA Outreach



SFx Interview Series - Hosted by Dargun Fortuna AIA:

Watch Videos at the Links Below:

[Dana Ellis, AIA,](#)



[Jeremiah Russell, AIA](#)



[Darguin Fortuna, AIA](#)



[Joshua Zinder, AIA](#)



[Bart Shaw, FAIA](#)



[Thomas V. Lawrence, AIA](#)



[Julie Flattery](#)