



## Pushing Down Work to Administrative Staff

By Judy A. Beebe, CDFA

Administrators are no longer just answering phones and managing calendars. While there is still a need for those tasks, many administrators are taking on project roles and responsibilities that are often times assigned to junior or senior “technical” staff. Why the shift in assigning more project tasks to the administrative staff? It just makes good business sense overall, given the layoffs and tightening of belts in the past few years, and it allows more opportunity for staff growth and advancement within the firm.

*We were just discussing this terminology – push work down – on a project where we have a smaller fee up front and in order to make a profit we are going to have to push work down to the lowest possible level to a) free up the managers to do what they do best and allow them time to manage the project, and b) put the highest number of hours on the lowest possible cost. This is a pretty basic concept to me, but it seems to be a hard one for managers to embrace. (Colette Adams, CDFA)*

Administrative staff are typically assigned contractual and construction administrative tasks, but there are other roles and project functions that can be pushed down for them to manage. If there is some hesitation with an administrator assuming a project role or producing a project deliverable, the essential question is “does the role or the document require a licensed practitioner?” If the answer is no, the role or document is administrative in nature, and can be managed by administrative staff. Pushing the work down increases the bottom line and as a result administrative staff add value to the client and the firm.

Not every administrator, however, can transition to managing those project roles and responsibilities. It takes a well-rounded administrator to be successful; one who has the right combination of soft and hard skills; one who has a professional base that is steady, but flexible. Let’s first take a look at the hard and soft skills needed, and then we’ll look at specific project roles and documents that can be pushed down to administrative staff.

### Hard and Soft Skills

- Find a mentor  
Having a mentor can make an enormous difference in your career. Mentors provide institutional knowledge about your industry and your employer. That knowledge is priceless – it enables you to expand your learning curve, it enables you to become more proactive, and it enables you to react to situations from a more informed vantage point.
- Change your language  
If the administrator being considered for more project responsibilities is still asking “what can I help you with?” it’s way past time for a constructive conversation. An experienced and knowledgeable administrator doesn’t ask what, and instead states “here is what I



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can do for you.” It’s that language change that creates a professional mindset and empowers the administrator to be bold; to take on tasks that he/she wouldn’t have imagined anyone on the project team to request of them.

- **Speak the language**  
Mirror the language and terminology of the project team. Refer to *lessons learned, scope, schedule, budget, and audit*. Know the acronyms the team is using and what they stand for and use them appropriately.
- **Learn the business**  
Not only learn the business so you have a better understanding of what your firm does and how it does it, but learn the project’s scope, schedule and budget. Know what work products are due when. Learn to identify scope creep. Read the contract to become familiar with the project and with the client’s expectations. Knowing the business and the project specifics makes being proactive much easier.
- **Plan the work, then work the plan**  
Organizational skills are key to helping the project stay on schedule. Develop a plan for completing the work with regard to what is expected, when it is due, and what reviews, drafts, approvals and signatures have to be processed before submission of the final product. Anticipate barriers to getting the work done and incorporate solutions into your work plan. A well-developed plan enables success.
- **Strong writing, editing, and communication skills**
- **Computer knowledge and ability**
- **The ability to analyze, chart, summarize, and report**
- **Demonstrate leadership**  
Exceed expectations and execute outcomes as recommended by Robin Crowe (*Rock Solid Leadership* presentation, International Association of Administrative Professionals’ 2007 convention). Be accountable for your work. Be successful in leading a team to expected outcomes. Be confident in your decisions. Working within your authority level versus what you need to discuss with the project manager is key.

## **Management Roles and Project Documents**

The design industry often stereotypes project administrative staff with regard to the role they serve on projects. Ask someone assigned to a project and you’ll likely hear they are managing the contract documents during design (e.g., drafting, reviewing, auditing, monitoring, and controlling, for both prime and subcontracts); they are providing support during construction (e.g., tracking RFIs, and preparing and processing change orders); or they are scheduling meetings, taking meeting minutes, and providing miscellaneous support. Administrative staff



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can be responsible for more than those stereotypical project tasks. They can serve as the lead (think “manager”) for other project tasks. For example:

- **Project Management Plan (PMP)**  
If the administrative staff know the scope, schedule and budget, and understand the overall project organization, they can develop the project’s management plan. The PMP outlines how the project will be managed, and includes such items as the organization chart, contract payment provisions and cash flow, allowance for contingency/reserves, team roles and responsibilities, subcontract start-up procedures, document management and control, invoice processing, and close-out procedures.
- **Quality Assurance/Quality Control (QA/QC)**  
Administrative staff can serve as the QA/QC manager, responsible for developing the QA/QC plan – the procedures and systems and forms to ensure the work has been checked, reviewed and approved. The plan would include such items as how the subconsultants are going to be managed and whether they follow the team’s established practices or abide by their own quality plan; how the calculations, drawings, specifications, and technical reports will be prepared and checked; the standards for signing and sealing documents; the use of external standards, and the control of software and other electronic documents.
- **Safety**  
Whether it’s for the project office or combined with the construction site, administrative staff can serve as the safety captain and develop the Safety Plan – the procedures and associated forms for items such as what to do in the event of medical emergencies, fire alarms, earthquakes, and bomb threats, including protocols for general office/building security and field/site safety.
- **Communications/Public Involvement Plan**  
Depending on the size and complexity of the project, public outreach might be needed. Administrative staff can manage the communication team, and can develop the roles and responsibilities, goals, strategies, tactics and opportunities (as well as identifying risks) that will be implemented to increase public awareness and acceptance of the project, and to respond to public inquiries.
- **Risk Registers**  
Administrative staff can participate in the identification of administrative risks to the project, and they can create the framework for and maintain the project’s risk register.
- **Document Management and Control**  
Administrative staff can serve as the person in charge for the project’s records, and that doesn’t mean it’s limited to just what’s in the file cabinets. With the multitude of electronic means to manage and organize projects, administrative staff can manage that software/program, as well as developing the protocols for the electronic file structure.



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They can develop the systems and procedures to be used for the life of the project, from kick-off to close-out, including an archival retention plan.

## **Leave the Project Administrative Work to the Project Administrative Staff**

The design industry's best practice should be to allow the project administrative staff to manage the project administrative tasks. It improves the bottom line, and it allows more opportunity for staff growth and future advancement within the firm. Remember, if it's not project technical design and if it does not need to be signed, sealed, or managed by a licensed practitioner, it's administrative in nature, and pushing down the work to the administrative staff just makes good business sense.

*Judy Beebe served as SDA's first On-Line Resources manager from its inception in 2000 until 2004. She was the catalyst for getting SDA members to share their knowledge, and for getting authors outside of SDA to share as well. She continues to be a frequent contributor to SDA's library of knowledge.*