

Lines of Succession

Succession planning has been an unsolved problem since Henry Hobson Richardson died without a will. From Shepley Bulfinch to RAMSA, a look at how firms hand the reins to the next generation—and what gets lost when they don't.

Succession planning in architecture—the carefully constructed process of transferring firm leadership to a new generation—has been getting attention lately. Though the professional press has focused largely on Modernist starchitects, with articles appearing in both *Architectural Record* and *The Architect's Newspaper* this past June, the moment is particularly significant for practices devoted to traditional architecture, as the architects who returned a traditional approach to the mainstream beginning in the 1980s are today in their 80s and 90s. Now their protégés—both in their own offices and at second-generation firms—are looking ahead and thinking strategically about the future. But as Gary Brewer, until 2024 a partner at Robert A.M. Stern Architects and now in independent practice, points out, it can be daunting: “Founders can find it hard to let go, or to think about their own mortality when they still feel they are mid-career.” There’s a lot to think about: What happens to a firm’s name? Its character? Its assets? Its principals? Its principles?

In the late 19th century, when architecture was a “gentlemen’s profession,” these questions were left to “handshake relationships,” in the words of architect and historian Mark Hewitt, and “very few firms managed to continue if they started with a single name.” But since the turn of the 20th century, when architecture began to professionalize, architects have been thinking about how colleagues can carry on their work after they leave the field. The firm, once a personal possession, became a repository both of the founders’ reputation and of their business assets, from drafting tables to intellectual property.

Ours is not the first generation of American architecture firms to resolve issues of ownership, authorship, and leadership. Henry Hobson Richardson, despite his renown, hadn’t even prepared a will when he died at 47 in 1886. In a deathbed letter he specified, “It is my wish that all my professional business shall be carried on by my assistants”: George Foster Shepley, Charles Hercules Rutan, and Charles

Allerton Coolidge. All in their 20s and 30s at the time, they bought Richardson’s assets—including his drawings—from his widow and shepherded his unfinished projects to completion, “scrupulously giving him full credit,” as Jay Wickersham and Chris Milford describe in their 2024 book on Richardson, even as they organized the new firm of Shepley, Rutan and Coolidge to undertake new work. “There was a very clear and deliberate division” between the two firms, according to Wickersham—but the successor firm carried the founder’s vision forward.

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The firm carries on even today as Shepley Bulfinch. Angela Watson, its president and CEO, leads a very different practice in a very different world: a women-led business enterprise, formally a corporation, with independent board members, offices in five cities, and all principals, senior associates, and associates holding shares. Yet the firm’s 150-year-plus history, proudly detailed on its website, remains a touchstone. “I believe we’ve remained relevant and successful because we continue to see our work, as Richardson did, as about places for people and not just about buildings,” Watson tells me.

THE IMPLICATION OF THE AMPERSAND

McKim, Mead & White, on the other hand, kept the firm name intact after Stanford White’s murder in 1906, Charles Follen McKim’s death in 1909, and William Mead’s retirement in 1919. (Facing personal bankruptcy, White had withdrawn from ownership in 1905, but the firm, recognizing its value, kept his name on the door.) The firm named

additional principals in 1906, among them the designers of some of its most renowned work: William Mitchell Kendall, responsible for the Municipal Building in New York (1915) and the competition-winning campus for Harvard Business School in Boston (1925), and William Symmes Richardson, responsible for the Racquet and Tennis Club on New York’s Park Avenue (1918). Still the firm remained “McKim, Mead & White.” Throughout the 1930s it was “the powerhouse for conservative clients—and the three founders’ names gave the firm a marketing edge,” according to Samuel G. White, historian, founding partner at PBDW Architects, and Stanford White’s great-grandson.

The partnership agreements stipulated that the firm was entitled to use its historic name only so long as one of the partners who had worked with a founder remained. Significant projects continued to come in under subsequent generations of leadership: partner Lawrence Grant White won the commission to design the Museum of History and Technology on the National Mall in Washington, D.C., shortly before his death in 1956, and the building, completed in 1964 and now the National Museum of American History, was credited to McKim, Mead & White both publicly and on the construction documents. Only in 1961—55 years after Stanford White died—were the firm’s assets acquired by the newly named Steinman, Cain & White (Cornelius White being no relation to Stanford).

While a practice like H. H. Richardson’s gave clear design authorship to one individual, ampersand names like McKim, Mead & White carry within them an assurance of collaboration, making it easier to introduce new leadership to the market. Both firms also presented a division of labor: McKim and White worked on their own design projects while Mead, the manager, anecdotally “kept them from making fools of themselves.” And as Wickersham relates, Richardson’s successors Shepley, Rutan & Coolidge “recognized the power of a triumvirate,” with Shepley as leader, Coolidge as designer, and Rutan providing technical and construction expertise.

The David Dinkins Municipal Building, New York (McKim, Mead & White, 1915). Many of the buildings the firm of McKim, Mead & White is best known for, including the highrise Municipal Building in Lower Manhattan, were designed after the founding partners had left the field.

WHAT'S IN A NAME

Authorship is an important consideration, as the world tends to read a firm's work as coming from the hand of one name partner; and the related question of whether to rebrand when that name leaves remains a subject of contention today. Robert A.M. Stern at one time considered stipulating that after his departure his partners could use his name only for a few years, and only for projects in which he had been personally involved. (In his 2021 memoir, *Between Memory and Invention*, Stern cites the example of Eero Saarinen, whose work was left in the hands of his assistants Kevin Roche and John Dinkeloo.) But as his practice grew more complex, Stern gave his blessing for his partners to carry on in his name. The firm, now with 18 partners, remains formally Robert A.M. Stern Architects but goes by the acronym RAMSA.

Name recognition is an asset, and the early 20th-century practice of adding names as new partners join has largely fallen by the wayside. Architect John Ike's current firm, Ike Baker Velten, revives that tradition, acknowledging the leadership of younger partners Carl Baker and Tyler Velten. Ike's former partner Thomas Kligerman, founding partner of Kligerman Architecture & Design, elevated four partners after his amicable split with Ike; he and his new partners discussed stringing all their names together, but the consensus was that Kligerman's was the only name already established as a brand.

Lawrence "Murphy" Antoine, today president and chairman of the planning firm Torti Gallas + Partners, maintains, "I'm not interested in adding my name. There's value in the name John and Tom have built. It's about values, not personal expression." His goal, he says, is to get the firm to its 100th year, 27 years from now—when "it won't be me" leading the organization.

Elizabeth Plater-Zyberk, a founding partner of DPZ CoDesign, counts the choice of the firm's name among the most difficult business decisions she and her colleagues have made. Once Duany Plater-Zyberk Architects and Town Planners, the firm is now DPZ CoDesign, a name that preserves the founders' brand while signaling something more than an

ampersand can: as managing partner Galina Tachieva explains, it puts the emphasis on collaboration not only within the firm but with clients as well.

LOOKING AHEAD

Everyone I spoke with stresses the importance of starting to think about succession early—while the older generation is mid-career—since organizing for succession is typically a five- to ten-year process that involves many

sensitive issues. Robert Herrmann, of Offit Kurman Attorneys at Law, who advises design firms on partnership agreements, shareholder agreements, and succession planning, begins his consultations with a questionnaire that helps clients understand what's at stake, including which of several structures—corporation, partnership, LLP, LLC—best suits the firm. In his experience, founders often start late. "It's important to open the conversation before prospective partners leave in frustra-



tion,” he tells me. “Young architects want to see a career path.”

One of the challenges is determining what a firm is worth in dollar terms—a process called valuation—and then finding ways to make it possible for new partners, typically mid-career professionals with limited funds, to buy in, generally over a period of years. Some firms orchestrate the drawdown so that partners begin selling shares while they’re still active and their stakes zero out at retirement. Others structure the buyout to commence as owners step back, requiring principals to rely on the firm’s continued success.

“We knew long ago we weren’t going to just walk out the door,” reports Plater-Zyberk. When she and her husband and co-founder, Andrés Duany, first considered inviting younger associates to take on shares, they found that their initial approach would entail a large tax burden; she stresses the need for expert advice as architects approach this juncture. While the founders retain shares with veto power, day-to-day management is now in the hands of four second-generation partners.

Ricardo Álvarez-Díaz, founder and chairman of Álvarez-Díaz & Villalón, began thinking about succession in his early 40s; today he and his wife and partner, Cristina Villalón, are planning for two generations of future leadership. His firm’s ladder of associates, associate partners, and partners, he stresses, is “nothing more than a professional education in leadership,” helping colleagues become “not just stewards of the founders’ vision, but of the profession of architecture as a whole, by giving them an education in the importance of running a business.” The firm commissions a fresh valuation every three years.

“Transition is a choice,” John Torti, a founding principal at Torti Gallas + Partners, reminds me. Some firms simply shut their doors—“a time-honored path,” in the words of one architect I spoke with, though it requires investment in “tail insurance” for at least three to five years to cover potential claims, as Herrmann points out. Alternatively, firms can sell to a larger entity, which may generate a higher initial payoff but brings the uncertainties of an arranged marriage.

But for partners who know they want to continue working together, and who have nurtured future generations and feel obliged to give them a clear path forward, succession planning is critical. Torti’s firm is now in its fourth generation after organizing a fair and equitable internal sale. Says Antoine, the fourth-generation leader: “If you decide to close your firm, it starts to wither right away. A functional firm needs to carry on.”

Mark Ferguson, a founding partner at Ferguson Shamamian and dean of Catholic University’s school of architecture, agrees. He has

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worked to create a culture where people learn to take care of each other, with a clear path to follow and signposts such as reviews, promotions, and bonuses. “People need a hopeful future, and succession planning provides confidence,” he says. “Once it’s in motion, it would be immoral to let it evaporate.”

CHOOSE YOUR PARTNERS

“There are many ways for firms to imagine continuity, and different firm cultures support different succession models,” Ferguson continues. Next-generation partnerships tend to be organized in one of two ways. The first assembles complementary talents. When it came to choosing partners, says Torti, “I looked around the room and asked the person least like me: Tom Gallas.” Gallas, who joined Torti as CFO and founding principal, was not an architect but a CPA. This is the model of firms that elevate some partners for their design talents and others for their management or business expertise.

The second approach, more common at smaller firms, requires each partner to cover all the bases—design, management, and bringing in work. This was long true at RAMSA, though partner Daniel Lobitz tells me that while the now 275-person firm continues to value well-rounded individuals, “We now acknowledge that people have different skills, and most projects now have multiple partners playing distinct roles.”

Either way, Wickersham, who is a lawyer as well as an architect and a historian, recommends that principals start mentoring potential younger owners early—and reminds us there’s a big difference between project management and firm management. His colleague Bennet Heart, likewise a partner at the law firm Noble, Wickersham & Heart, advises interviewing potential owners early: “Do they want to become leaders? And if yes, do they want to become businessmen?”

It’s important to remember that ownership, leadership, and authorship are not always synonymous. “It’s only implicit that a firm’s owners are its decision-makers,” says Wickersham. Heart adds that it’s wise to separate leadership and ownership as valuable leaders approach the time when they should transfer their shares, so as not to inhibit younger generations: “Leadership and ownership are related, but separable, and shouldn’t

always go in lockstep.” Shepley Bulfinch is a corporation led by a CEO who is an architect and a shareholder; RAMSA is an LLP led by Lisa Matkovic, a CEO with a background in human resources and business administration who is not a partner.

CARRYING FORWARD THE HOUSE STYLE

Another consideration is the work a firm is best known for—especially important for clients seeking something similar to what they’ve seen and admired. In Ferguson’s words, “Reputation is our gift for the new leaders to take care of.” But will the successors remain true to the firm’s mission in a changing world? Traditionalist firms including McKim, Mead & White struggled to maintain their identity as Modernism swept the field. “I try to teach a philosophy and trust the forms will follow,” says Kligerman. “I’m hoping my partners will pick up where I left off.” Lobitz adds that the RAMSA partnership is “unanimous” in continuing the founder’s “time-honored approach that architecture should grow out of place, tradition, and history.” His next-generation partner Gemma Kim cites the continued importance of the firm’s founding principles: “Knowing how to build, knowing the principles of Classical architecture and proportions even as we design in various styles, is paramount.”

Commitment to first principles is not a given, however. Torti recalls that he took over a firm specializing in suburban subdivision planning—“the work we love to hate today,” he says—before making a 180-degree turn to follow “the epiphany of new urbanism.”

TRADITIONAL ARCHITECTURE TODAY AND TOMORROW

Planning for the future of a firm beyond one’s lifetime may seem like a grasp for immortality. But there are nobler motivations. One is to sustain the careers of those who have contributed so much to the founders’ success: “I enjoy empowering people to do what they love,” Watson of Shepley Bulfinch tells me. Another responsibility goes beyond the careers of individual practitioners. Says Brewer, “It’s important that the practice of traditional architecture live on, carrying forward the intellectual revival founders like Stern and Allan Greenberg initiated, so that the profession can continue giving the public what it wants.” **TB**

Peter Morris Dixon supports architecture and design firms with their business development and communications programs. He acknowledges the contributions of Gary Brewer, who conceived and helped shape this article and participated in many of the interviews.