

MON  
FEB 24

|       |  |
|-------|--|
| 7:00  |  |
| 7:30  | Pre-scheduled one-on-one clinics with Advisors<br><i>Rainmakers</i>  |
| 8:00  |  |
| 8:30  |  |
| 9:00  |  |
| 9:30  |  |
| 10:00 | New attendee meet and greet<br><i>Rainmakers</i>   |
| 10:30 |  |
| 11:00 | Welcome lunch and remarks - <i>Rainmakers</i>  |
| 11:30 |  |
| 12:00 |  |
| 12:30 | Break  |
| 1:00  | General Session:<br>THE DIGITAL TRANSFORMATION OF<br>SUSTAINABILITY: A CONVERSATION ON<br>THE EDGE OF NOW - <i>Rainmakers</i>  |
| 1:30  |  |
| 2:00  |  |
| 2:30  | Break  |
| 3:00  | Roundtable Discussions: (choose one)<br>• <i>The Digital Transformation of Sustainability</i> - Pathfinders<br>• <i>The Road to 2030</i> - Sitgreaves<br>• <i>Beyond Websites and E-News: Building Future Business</i> - Whipple |
| 3:30  |  |
| 4:00  |  |
| 4:30  | Break  |
| 5:00  | Group cocktails and dinner<br>Marshall's Outpost Pavilion at The Westin Kierland   |
| 5:30  |  |
| 6:00  |  |
| 6:30  |  |
| 7:00  |  |
| 7:30  |  |

TUE  
FEB 25

|  |  |
|--|--|
| Breakfast - <i>Rainmakers</i>  |  |
| Roundtable Discussions: (choose one)<br>• <i>Leadership in an Era of Continuous Change</i> - Pathfinders<br>• <i>Navigating the 2020 M&amp;A Market</i> - Sitgreaves<br>• <i>What Could Possibly Go Wrong? Let Us Count the Ways...and Plan for Them</i> - Whipple         |  |
| Break  |  |
| Roundtable Discussions: (choose one)<br>• <i>The Road to 2030</i> - Pathfinders<br>• <i>Beyond Websites and E-News: Building Future Business</i> - Sitgreaves<br>• <i>Leadership in an Era of Continuous Change</i> - Whipple  |  |
| Lunch - <i>Rainmakers</i>  |  |
| General Session:<br>DESIGNING THE AEC FIRM OF THE FUTURE<br><i>Rainmakers</i>  |  |
| Break  |  |
| Roundtable Discussions: (choose one)<br>• <i>Navigating the 2020 M&amp;A Market</i> - Sitgreaves<br>• <i>What Could Possibly Go Wrong? Let Us Count the Ways...and Plan for Them</i> - Whipple<br>• <i>What Story Does Your Organization Structure Tell?</i> - Pathfinders |  |
| Break  |  |
| Off-site Activities: (choose one)<br>• <i>Desert Botanical Garden</i><br>• <i>Saguaro Forest Hummer Tour</i>   |  |
| Group dinner<br>Sol Cocina, Phoenix  |  |

WED  
FEB 26

|   |  |
|---|--|
| Breakfast - <i>Rainmakers</i>   |  |
| General Session<br>MAKING THE BIG LEAPS: STORIES OF RISK AND REWARD<br><i>Rainmakers</i>  |  |
| Break   |  |
| General Session<br>ADVISOR DODGEBALL*<br>(*everything you wanted to know about industry business, but didn't ask earlier) - <i>Rainmakers</i> |  |
| <i>The CEO Forum ends at 11:30 am. Boxed lunches can be picked up in Rainmakers.</i>  |  |



- A E Advisors:**
- Ames & Gough |** Brett Gough, Matt Gough, Mike Heatwole
  - Friedman & Partners |** Richard Friedman
  - HR Advisors Group |** Barbara Irwin, Cyndi Branciforte
  - Knowledge Architecture |** Christopher Parsons, Susan Strom
  - Matheson Financial Advisors |** Colvin Matheson, CFA, CM&AA  
David Cohen, Esq., ASA
  - Sprinkle Leadership |** Kathryn Sprinkle

**monday, february 24th, 1:00 pm**

## THE DIGITAL TRANSFORMATION OF SUSTAINABILITY: A CONVERSATION ON THE EDGE OF NOW

keynote speaker **john picard**, founder, john picard and associates

We are pleased to welcome futurist John Picard who will talk with us about unlocking the power of Silicon Valley and technology for the common good. He will touch on the breakthroughs in energy storage, as well as new developments in artificial intelligence. John will take us on a virtual tour of the newest tools and latest breakthroughs being applied to some of the world's biggest problems. He'll present case studies of start-up companies developing nano materials, prefabrication, robotics, smart windows and floors, IOT, and POE systems for buildings and many more blue sky technologies. This will be an exciting ride into the future and a stimulating conversation on the Edge of Now.

**tuesday, february 25th, 12:30 pm**

## DESIGNING THE AEC FIRM OF THE FUTURE

panel moderated by **christopher parsons** of knowledge architecture

panelists:  
**ellen bensky**, turner fleischer architects  
**chris rayasam**, murraysmith  
**scott cattran**, woolpert

What is your vision for your firm in 2030? What will your firm need to change in terms of the way it pursues work, executes work, recruits talent, and engages employees to thrive in the future? How are you thinking about leadership succession and ownership transition? How will (or won't) technology change your business? What are you most excited about and what concerns you the most when you look ahead? In this session our panel will discuss these questions and more as we dive deep into the topic of designing the AEC firm of the future.

**wednesday, february 26th, 8:30 am**

## MAKING THE BIG LEAPS: STORIES OF RISK AND REWARD

panel moderated by **kathryn sprinkle** of sprinkle leadership

panelists:  
**tricia esser**, ktgy  
**sarah hempstead**, schmidt associates  
**john coudery**, cascade environmental

Constant change can sometimes cause us to lose sight of our company's charted course, gradually veer off-course, and then respond reactively to what comes our way.

Good leaders anticipate and respond to changes that affect their teams and organizations. Strong leaders prepare their staff to be flexible and adaptable to change.

Exceptional leaders create change and, when baby steps aren't enough, they make big leaps to stay the course and get their organizations where they need to go.

Our panelists, your executive peers, will share their own stories of making big leaps — what risks they faced, the factors that led to their decisions, and how those decisions played out.

**wednesday, february 27th, 10:30 am**

## ADVISOR DODGEBALL\* (\*EVERYTHING YOU WANTED TO KNOW ABOUT INDUSTRY BUSINESS, BUT DIDN'T ASK EARLIER)

Don't miss our closing general session, in which the AIE Advisors stand before the group to catch, not dodge, your questions about any aspect of the business. Whether seeking clarification about points made during the program, or introducing a topic not yet addressed, queue up your queries to share with the group. The Advisors will also bring nuggets from the breakouts to share with all attendees.

And, yes, we will provide projectiles you can lob, pitch, or throw at us to keep us on our toes!

## THE DIGITAL TRANSFORMATION OF SUSTAINABILITY: A CONVERSATION ON THE EDGE OF NOW

facilitated by **john picard** of john picard and associates

John will carry the general session conversation into a breakout in which he will answer further questions, elaborate on some of the points he made in his presentation, and talk through with us the transformational issues most affecting our industry businesses.

## NAVIGATING THE 2020 M&A MARKET

facilitated by **colvin matheson** of matheson financial advisors

Colvin will lead a roundtable focused on how firms are navigating the 2020 M&A market. With the economic expansion, the construction market, and the M&A market all reaching record long cycles...when does it cool or even end?

When does today's Seller's Market shift to a Neutral or Buyer's Market? We all sense it's "supposed to", and indeed it will...but we at MFA are not seeing the pace of M&A slow much (at least at this writing in late 2019).

How can buyers and sellers prepare themselves and yet stay engaged in the M&A game whether on an up-swing or a down-swing? Attendees of this session will discuss the current environment and what firms are doing to prepare for and navigate the uncertainty before us. Topics will include deal valuation multiples, transaction structures, reps and warranties, due diligence, and integration issues.

## THE ROAD TO 2030 – WHO'S DRIVING CHANGE, IS OUR WORKFORCE ON THE BUS, AND WHAT'S IN OUR WAY?

facilitated by **laurie dreyer** of *taylor design and barbara irwin* of *hr advisors*

Just 10 years ago, we were in a deep recession, and many firms didn't make it. If you are joining the 2020 CEO Forum, your company did!

The talents and strategies that got us from 2010 to 2020, however, may not be the tools we need to get down the road to 2030. We have new obstacles to overcome along that road including dramatic shortages of the staff we need; diverse generational workplace expectations; accelerating climate change; and a probable recession.

Who provides leadership in this increasingly volatile environment? How do we find and develop staff who can accept, adapt to, and even embrace, the rapid pace of change as we plan new directions, strategies and initiatives?

This session's discussion will explore the obstacles and sometimes daunting challenges the group anticipates for their firms as they both lead, and prepare the next generation to lead, their companies through the 2030 milestone.

## BEYOND WEBSITES AND E-NEWS: BUILDING FUTURE BUSINESS

facilitated by **richard friedman** of *friedman & partners*

Staying stagnant invites obsolescence. What's your firm doing to identify the next big opportunities? What steps are you taking to move up your clients' value chain to help shape their needs and earn higher fees? In terms of business development, how are you approaching BD differently now, and how are you preparing to approach it differently going forward? What's your firm doing to enhance these skills among staff? Join us for a wide-ranging discussion about the future of building business for A/E and environmental consulting firms.

## LEADERSHIP IN AN ERA OF CONTINUOUS CHANGE

facilitated by **christopher parsons** of *knowledge architecture*

AEC firms are continuously changing. Major drivers of change include items such as growth (staff, geography, markets, services, mergers & acquisitions), transition (leadership, ownership, subject matter experts), technology, and five generations of employees in the workplace. The pace of change is picking up and shows no sign of stopping. At the same time, AEC firms are striving to become even greater places to work—more innovative, equitable, inclusive, collaborative, transparent, healthy, balanced, sustainable, and calm.

In this session, participants will share strategies for re-designing their firms to thrive during periods of accelerated change, becoming more effective change agents, and leading their firms into an unknowable future while *reducing* anxiety and fear and *increasing* calm and collaboration.

## WHAT COULD POSSIBLY GO WRONG? LET US COUNT THE WAYS...AND PLAN FOR THEM

facilitated by **matt gough** and **brett gough** of *ames & gough*

As your practice continues to grow and diversify, you may find yourself in uncharted waters. How do you navigate your firm through the unknown exposures that lie ahead? Our session will discuss some of the newest emerging risk trends impacting A/E firms across the country. In addition, we will review some of the latest statistical claims data and ways to implement specific policies and procedures to better protect your organization.

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## WHAT STORY DOES YOUR ORGANIZATION STRUCTURE TELL?

*facilitated by* **kathryn sprankle** *of sprankle leadership*

A good organization structure can tell us a lot about a company's culture and priorities. It is the bare bones story of how the company operates. We can see how the firm is led and where authority and accountability lie; how different units interact among each other and with business services; how employees might advance professionally; and how work is delivered (by region? market? service line?).

In this session, we will examine different organization layouts, working with examples provided by participants. Some of the questions we want to answer about each layout:

Does it make sense?

- Is it sustainable over time—in both thick and thin cycles?  
Or does it go through short-term shifts?
- How does it reflect culture and priorities?
- Does it tell an accurate story, especially to employees?